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## Essential Paperwork Checklist for Aging Parents

Use this checklist during your family meeting to gather and organize important documents and permissions.

### 1. Legal Decision-Making Authority (Must-Have)

- Durable Power of Attorney (Financial)
- Durable Power of Attorney for Health Care / Advance Health Care Directive

### 2. Medical Emergencies (Must-Have)

- HIPAA Authorization Form
- POLST (Physician Orders for Life-Sustaining Treatment)

### 3. Estate Planning (Highly Important)

- Last Will and Testament
- Living Trust Document
- Deeds titled in the name of the trust

### 4. Insurance and Financial Accounts (Very Important)

- Life Insurance Policies
- Long-Term Care Insurance Documents
- Bank Account Info and Access

- Investment and Retirement Account Info
- Real Estate Ownership Records

## **5. Identification and Vital Records (Important)**

- Birth Certificate
- Social Security Card
- Medicare Card
- Driver's License or ID
- Marriage/Divorce Certificates
- Military Records (DD-214 if applicable)

## **6. Final Arrangements (Helpful, Not Urgent)**

- Funeral or Cremation Plans
- Preferred Funeral Home Contact Info
- Obituary Instructions
- Contact List for Notifications

## **7. Digital Accounts and Access (Nice to Have)**

- Password List or Password Manager Access
- Cell Phone/Computer Access Instructions

## **8. Document Storage Plan**

- Fireproof Safe / Binder with Labeled Tabs
- Cloud Backup Setup (Dropbox, Google Drive, etc.)
- List of Document Locations Shared with Key People