

# WHAT TO ASK YOUR AGING PARENTS CHECKLIST

1

## Legal/Financial

- ☐ Do you have a will, living trust, power of attorney, and living will/advance directive? Where do you keep these documents?
- ☐ Names and contact information for their lawyer, financial advisor, and accountant/tax preparer
- ☐ What are your sources of income?
- ☐ What are your outstanding debts and a list of recurring bills?
- ☐ List of investment and bank accounts
- ☐ List of passwords
- ☐ Do you have any life insurance policies we should be aware of?

2

## Medical/Health

- ☐ Names and contact information for current and preferred physicians, specialists, and other healthcare providers
- ☐ Medicare and health insurance information
- ☐ List of medical conditions, medications, and allergies
- ☐ Have you completed a living will/advance directive? What are your preferences for end-of-life care?
- ☐ Who would you like to serve as healthcare proxy to make decisions on your behalf if you are unable to make decisions on your own?
- ☐ Names and contact information of friends and neighbors who may be able to help in case of an emergency

3

## Housing/Daily Living

- ☐ In an ideal situation, would you prefer to stay at home, move in with family, or move to assisted living?
- ☐ Would you consider downsizing or relocating?
- ☐ If you were to move into a senior living community, would you rather stay close or move to a different location?
- ☐ What factors are most important to you when considering a change in living situation: proximity to family and friends, privacy, cost, access to social activities, etc.
- ☐ Do you have a preferred home care agency or caregiver?

4

## Emotional/Social

- ☐ What makes you feel connected and cared for?
- ☐ What activities or hobbies do you want to continue to pursue?
- ☐ Are there friends or religious or community groups you want to stay in touch with?
- ☐ What are your spiritual or religious preferences and practices?