Premier Insurance Contracts, Inc
contact@prinsuco.com

Caring for an Aging Parent Checklist

Caring for an Aging Parent Checklist

General information	Yes	No	N/A
1. Has relevant personal information been gathered? • Name, phone number, and address of parent • Parent's date of birth • Parent's Social Security number • Name, phone number, and address of attorney, physician, geriatric care manager, or other advisor • Parent's legal state of residence • Parent's health status • Parent's marital status • Family members available for support	❑	❑	❑
2. Has the parent's financial situation been assessed? • Income from pension, Social Security, employment, or other source • Expenses • Assets • Liabilities	❑	❑	❑
Notes:			

Insurance planning	Yes	No	N/A
1. Does the parent have life insurance?	❑	❑	❑
2. Does the parent have long-term care insurance?	❑	❑	❑
3. Does the parent have adequate health insurance? • Medicare • Medigap	❑	❑	❑
4. Does the parent have an adequate amount of other types of insurance? • Homeowners insurance • Auto insurance • Umbrella liability insurance	❑	❑	❑
Notes:			

Estate planning	Yes	No	N/A
1. Does the parent have an updated will?	❑	❑	❑

2. Has the parent prepared advanced directives? • Durable power of attorney • Living will • Health-care proxy	❑	❑	❑
3. Has the parent prepared letters of instruction?	❑	❑	❑
4. If the parent's estate is likely to be subject to estate tax, have ways to minimize estate taxes been considered?	❑	❑	❑
5. Has the parent made funeral arrangements?	❑	❑	❑
Notes:			

Housing issues	**Yes**	**No**	**N/A**
1. Is the parent's current housing situation satisfactory?	❑	❑	❑
2. If so, have contingency plans been made in case a housing change is necessary in the future?	❑	❑	❑
3. Have the parent's wishes regarding housing been considered?	❑	❑	❑
4. Have the child's wishes regarding housing been considered?	❑	❑	❑
5. Does the parent currently need nursing home care?	❑	❑	❑
6. Have alternative housing options been explored? • Remaining in home (possibly with in-home care) • Moving in with relative • Assisted living • Continuing care retirement communities • Senior apartments • Nursing home	❑	❑	❑
7. Have adult day-care options been discussed and evaluated?	❑	❑	❑
Notes:			

Financial issues	**Yes**	**No**	**N/A**
1. Does the parent have enough money from income and savings to sustain his or her lifestyle?	❑	❑	❑
2. Is his or her asset allocation still suitable?	❑	❑	❑
3. Is the parent able to make appropriate financial decisions?	❑	❑	❑

4. Should the child's name be added to accounts?	❑	❑	❑
5. Does Medicaid planning need to be considered?	❑	❑	❑
6. Will the parent be dependent on the child for financial support?	❑	❑	❑
7. If so, have the child's financial needs been considered?	❑	❑	❑
8. Have distribution strategies been discussed and evaluated?	❑	❑	❑
Notes:			

Other	**Yes**	**No**	**N/A**
1. Has a list of important documents and records been prepared? • Bank account records (statements and passbooks) • Stock certificates, bonds, and other investment records • Credit card statements • Mortgage, insurance, utility bills • Retirement plan statements • Income tax returns for the last three years • Real estate deeds, mortgages, and other property ownership records • Vehicle titles • Business agreements • Insurance policies • Will, trust, advanced directives, letters of instruction, and other documents • Location of and key to safe-deposit box • Birth certificate and marriage or divorce certificates • Citizenship records • Passport • Military records	❑	❑	❑
2. If the parent has an interest in a business, have arrangements been made to continue or dispose of the interest in the event of incapacity or death?	❑	❑	❑
Notes:			

IMPORTANT DISCLOSURES

Broadridge Investor Communication Solutions, Inc. does not provide investment, tax, legal, or retirement advice or recommendations. The information presented here is not specific to any individual's personal circumstances.

To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.

These materials are provided for general information and educational purposes based upon publicly available information from sources believed to be reliable — we cannot assure the accuracy or completeness of these materials. The information in these materials may change at any time and without notice.

Premier Insurance Contracts, Inc
contact@prinsuco.com

Prepared by Broadridge Investor Communication Solutions, Inc. Copyright 2025