

**Trustworthy.**

# Checklist: Helping Your Elderly Parents



## Step 1

**Speak with your parents about assisting them. Here are a few approaches to get you started:**

- “I know this might be hard to talk about, but I care about you and want to make sure you’re taken care of. Can we find a time to discuss some plans for the future and how I can help you?”
- “I’ve noticed \_\_\_\_, and I’m a little concerned.”
- “I want you to keep enjoying the things you love. Can we talk about how I can help you do that?”

## Step 2

**Gather your parents’ documents and other important information, such as:**

- Names and contact information of friends, doctors, lawyers, professional advisors, relatives, and religious contacts
- Birth and marriage certificates
- Other legal certificates (such as immigration, citizenship, divorce, or adoption papers)
- Sources of income and assets (such as pensions and other retirement plans, investment accounts, interest, and Social Security), with account numbers and contact information
- Financial institution names, account numbers, and PINs
- Medicare/Medicaid information
- Health, home, auto, and life insurance policies, including policy numbers and contact information

- Recurring bills (mortgages, other loans, property taxes, insurance, utilities, etc.), with account numbers and contact information
- Credit card names, numbers, and contact information
- Important passwords
- Copies of recent tax returns
- Original deed of trust for home
- Vehicle titles and registration documents
- Military records

Trustworthy makes this process easy. The [Family Operating System®](#) is a single, secure place to organize and manage your parents' important information. Their sensitive information will be protected and available whenever you need it.

### Step 3

#### **Create a payment schedule for your parents' accounts.**

You can use [Trustworthy's](#) custom reminder feature to make sure you never miss a due date, pay a late fee, or get assessed additional interest.

### Step 4

#### **Take an inventory of your parents' safe deposit box.**

You may be able to access the box on your own if you have power of attorney (and the key), but if you don't, it's best to bring your parents with you.

### Step 5

#### **Collect the legal documents you may need, such as:**

- [Wills and/or living trust](#) details:
  - Revocable living trust
  - Irrevocable living trust
- [Power of attorney](#):
  - Medical power of attorney
  - [Financial power of attorney](#)
  - General power of attorney
  - [Durable power of attorney](#)
  - Limited power of attorney

- [Advance directives:](#)
  - Living wills
  - Do-not-resuscitate (or do-not-intubate) orders

## Step 6

### Consider whom you can turn to for support.

Depending on your parents' needs, you may want to add professionals to your team. These professionals may include:

- Financial planner, advisor, or accountant
- [Estate planning attorney](#)
- Wills attorney
- Trust administration attorney
- Witnesses to sign specific documents

You can keep them updated with Trustworthy. You can give trusted professionals or family members full access to all categories, or limit their access to specific information for a finite period.

## Additional Resources

- [Trustworthy Certified Experts™](#) are highly trained and experienced in estate organization. They provide personalized service and professional acumen to help get everything in order.
- AARP links out to [free advance directive forms](#) by state that can be printed out.
- The National Institute on Aging offers FAQs on [organ donation for older adults](#) and offers the ability to register online.
- The National Academy of Elder Law Attorneys outlines a list of questions to ask when interviewing an [elder law or special needs planning attorney](#).
- USAging is a national association that spearheads a network of local Agencies on Aging that develop, coordinate, and deliver a range of services for older people, such as a [money management program](#) that can help with bill paying. They can connect you to an organization in your parents' area.