

Protecting Our Loved Ones Checklist

Documentation:

- Date of Birth
- Current address
- Medical Insurance information (provider, policy number, plan type)
- Medical (“Advance”) Directive
- Current will or trust documents
- Power of Attorney
- Location of all financial information

Contact List (Names and Phone Numbers):

- Doctor(s)
- Medical Specialist(s)
- Estate Attorney
- Personal Representative
- Trustee(s)
- Financial Advisor
- Tax Advisor
- Insurance Broker
- Local Adult Protective Services

Action Items:

- Define goals and type of care desired at different life stages
- Review and update Power of Attorney, with gifting powers
- Review and update wills and trusts
- Identify location of all financial data
- Review asset allocation
- Develop retirement and long-term care plans
- Review and update insurance policies

If you suspect abuse:

- Report it to your local Adult Protective Services
- Contact your local state attorney’s office
- File a police report
- File Form 14039 with IRS
- Explore options at your local probate court
- Contact appropriate advocacy organization for additional guidance

