

CAREGIVING PREPARATION CHECKLIST

RETIREMENT BASICS

- ✓ Identify income sources
- ✓ Review monthly expenses
- ✓ Understand healthcare coverage
- ✓ Locate legal documents
- ✓ List emergency contacts

WHAT ADULT CHILDREN SHOULD KNOW (AT MINIMUM)

- ✓ Insurance type (Original Medicare vs Advantage)
- ✓ Prescription plan information
- ✓ Primary care provider
- ✓ Out-of-pocket responsibilities
- ✓ Who to call with questions

HEALTHCARE AND INSURANCE

- ✓ Medicare card location
- ✓ Insurance plan name
- ✓ Prescription drug plan
- ✓ Primary doctor and specialists
- ✓ Preferred pharmacy
- ✓ Supplemental insurance (if any)

LEGAL PREPARATION

- ✓ Healthcare Power of Attorney
- ✓ Advance Directive / Living Will
- ✓ Financial Power of Attorney
- ✓ Will or Trust
- ✓ Emergency contacts listed
- ✓ Document storage location known

CAREGIVING PREPARATION CHECKLIST

EMOTIONAL BOUNDARIES CHECKLIST

- ✓ Identify personal limits
- ✓ Communicate roles clearly
- ✓ Share responsibilities
- ✓ Schedule personal time
- ✓ Accept help without guilt

ACTION PLAN

- ✓ Acknowledge need for preparation
- ✓ Identify insurance & healthcare info
- ✓ Locate legal documents
- ✓ Create emergency folder
- ✓ Define personal boundaries
- ✓ Share caregiving roles
- ✓ Schedule annual reviews