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Legal Checklist for Aging Parents

20 must-have documents to protect your loved one's wishes and finances

As parents age, having the right paperwork in place protects their legal rights and helps their adult children carry out their wishes with confidence. Use this checklist to track down each document, note where it's kept, and mark it complete.

☐ *Not started* ☐ *Located / Complete*

Medical & Healthcare Documents

☐ **1. Durable Medical Power of Attorney**
Names who makes healthcare decisions if they can't.

☐ **2. HIPAA Release Form (all physicians)**
Authorizes doctors to share medical info with you.

☐ **3. End-of-Life Instructions**
DNR, hospice, organ donation, and funeral wishes.

☐ **4. Long-Term Care Insurance Policy**
Covers home care, assisted living, and nursing home costs.

Legal & Estate Documents

☐ **5. Durable Power of Attorney (financial)**
Lets a trusted person manage financial affairs.

☐ **6. Will, Estate Plan, or Trust**
Directs how the estate is distributed.

☐ **7. Divorce Decree(s)**
Notes any conditions affecting insurance or assets.

☐ **8. Citizenship Papers**
Needed to confirm legal status if applicable.

Identification Documents

☐ **9. Birth Certificate**
Needed for ID, passport, or benefits claims.

☐ **10. Veteran's Discharge Papers (DD-214)**
Required for VA benefits and military burial honors.

- [ ] 11. **Death Certificate of Spouse (if applicable)**
  Needed to retitle joint accounts and property.

Financial & Property Documents

- [ ] 12. **Deed to the Home**
  Needed to sell the home or settle the estate.
- [ ] 13. **Bank Account Information**
  List of institutions, accounts, and access.
- [ ] 14. **Financial Account Information**
  Stocks, bonds, brokerage account details.
- [ ] 15. **Insurance Policies**
  Health, life, and accidental death policies.
- [ ] 16. **Retirement Accounts**
  Pensions, 401(k)s, and annuities.
- [ ] 17. **Debt Documentation**
  Credit cards, loans, and rental agreements.
- [ ] 18. **Vehicle Title(s)**
  Needed to sell or transfer a vehicle.

Access & Contact Information

- [ ] 19. **Online Account Passwords**
  Email, banking, medical portals, digital assets.
- [ ] 20. **Key Contact Information**
  Doctors, lawyer, financial advisor, and family.

Tip: Update legal documents every 5 years — some states won't honor outdated Powers of Attorney or advance directives. Keep everything in one accessible, labeled folder.

This checklist is for informational purposes only and is not legal advice. Always consult a qualified elder law attorney for guidance specific to your situation.