

CHECKLIST ON FAMILY MATTERS (2014 edition)

The following checklist should help to organize family matters and plan ahead.

MONEY & FINANCES Organize money matters early and with trusted people.

- Cash flow, safe, bank & other money accounts (Location? Keys or combination? Co-signer?)
- Checking, savings, money market, fund beater, IRA, CD
- Safety deposit box; safe (Keys or combination to open? Co-signer?)
- Social security (direct deposit) or pension (if under age 66, social security disability):
- Check, mailed home or direct deposit Change the representative payee?

LEGAL MATTERS Contact attorney or financial expert about:

- Durable power of attorney (DPA) for:** Finances, Health, Springing DPA (give date to start)
- Living will; health surrogate; full code; prehospital DNR (Do Not Resuscitate)
- Trust funds
- Legal changes, update when: move to another state, stay in different states more than a few weeks each year, change in caregiver(s)
- Guardianship (**Plan ahead to avoid the need for guardianship.**)

FAMILY BUSINESS Someone must handle:

- Regular bills: Utilities Rent/mortgage Car repair Yard care Pet care Insurance
- Back up plans.** If something happens (hurricane, fire, etc.), what is the family backup plan? Who helps? List items to toss into a box or suitcase for an emergency evacuation: important papers, medicines, clothing, incontinence items, water, food, first aid kit, pet food, etc.
- Enroll in local emergency shelter with driver license/ID two emergency contacts
- Wallet-size page: brief Health Record: allergies, major illness, surgery, medicines, etc.; ICE (In Case of Emergency) number on cell phone with health information & contacts
- Medicine (Dose? Where is medicine located in home? Who renews & picks up refills?)
- Help with grocery shopping, bills, cooking, cleaning, laundry, house repairs, yard, travel
- Real estate (Location of property and deeds? Co-owners?)

INSURANCE Know policy schedule, location and agent. **CHECK WAIVERS & CO-PAYS!!**

- House; property Life Insurance General Medical Dental Veterans medical
- Medicare Long-term care Disability Medicaid Car Theft Fire Flood

SAFETY: Safety-proof the home. Plan ahead for crises: remove firearms; lock up or remove sharp knives, razors, scissors, sharp tools and appliances with cutting edges, etc.

- Drivers must be safe!** Plan ahead for other transportation.
- Identity bracelet/necklace for missing persons [Silver Alert (FL)]; locks on doors, fenced yard, recent photo on file, Medic-Alert/Safe Return Program; patient-caregiver bracelet set available; Life Line; ICE (In Case of Emergency) medical & contact info (1-877-564-6423)
- Address hoarding; reduce clutter
- ABUSE Registry (abuse, neglect, threat/exploitation) for the state, toll free hotline
- National Suicide Prevention Lifeline 24/7, 1-800-273-8255;
www.suicidepreventionlifeline.org/gethelp.aspx

IN EVENT OF DEATH Know & honor person's preferences.

- Summary of assets Funeral & memorial service details People to notify
- Autopsy for diagnosis Cemetery lot (Deed? Location?)