

The Caregiver Checklist of Documents, Providers, and Bills



Most of the time, caring for aging parents doesn't happen all at once; ideally, it's a gradual process of taking on more of the details that keep their lives running smoothly while preserving their sense of independence. Sometimes circumstances require a more abrupt transition into the role of caregiver. Regardless of your situation, there's a lot to think about and this season can be a challenge. Here's a to-do list to make the transition easier for everyone.

Legal and Financial Tasks

Will & Living Will

Ensure they are up to date, and verify the location of the signed originals.

Financial Power of Attorney and Health Care Power of Attorney

Keep copies of the signed and notarized documents for institutions and providers that require them.

Personal ID forms

Locate birth certificates, passports, driver's licenses, social security numbers, and military discharge papers, if applicable.

Proof of Ownership

Locate deeds to homes and rental properties, titles to vehicles and recreational vehicles, along with any warranties for major appliances and home improvements like siding, windows or the roof.

Tax Records

Know where tax records are stored, along with any documents for the upcoming tax year.

Banking & Financial Accounts

Obtain access to accounts by contacting the institution's customer service department. Often, the financial POA will get their own login credentials. Sign up for bank alerts via email and text notification so you can monitor for suspicious activity.

Credit Freeze

Freeze their credit at each of the three credit agencies: Experian, Equifax and TransUnion. This is a free way to protect against identity theft or elder fraud, and you can always unfreeze it if needed.

Consider keeping sensitive information in a new location if your parent is experiencing memory loss and tends to move items, then forget where they were placed.

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Bills

List Monthly Bills

Audit checking account and credit card statements to get a full picture of monthly bills and due dates.

Check Subscriptions

If you spot any subscriptions or bills that no longer seem relevant, ask your parents if those services can be canceled.

List Annual Bills

Consider bills that may only be due once a year, and may have been missed during your account audit: car insurance, property taxes, homeowners insurance, life insurance premiums, digital subscriptions, etc.

Auto-Pay

Set up auto-pay for as many bills as possible.

Email Access

Gain access to their email account so you can monitor for digital statements, fraud alerts, or bill notifications.

Mail

Sign up for USPS alerts. You'll get an email preview of the mail they're scheduled to receive each day, which can help watch for missed or stolen packages as well as solicitations.

Health Information

List Relevant Health & Medical Information

Request information regarding current medical conditions, prescriptions, allergies, pharmacies, and medical history.

Health Insurance, Medicare, and Medicaid

Make sure you have access to health insurance ID numbers.

HIPAA

Request a HIPAA form from their healthcare provider

Online Portal

Request to be added as a proxy in your parent's online patient portal.

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Service Providers

Locate names and contact information for the following individuals:

Doctor - General Practitioner

Doctor - Specialists

Attorney

Financial Advisor

Tax Preparer

Insurance Broker

Veterinarian

Hair Stylist or Barber

Lawn Care Company

Gutter Cleaning Company

Mechanic

About The Meakem Group

Whether you're caring for a loved one or planning for the future, The Meakem Group makes managing money simple and clear. No jargon, no stress—just practical guidance to help you be Smart About Money™.

If you found this checklist helpful, here are three more ways The Meakem Group can support you:

- A monthly newsletter packed with valuable insights
- Short, informative video clips on social media
- A review of your current financial plan

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