
AGING PARENTS

Aging Parent Planning Checklist

Difficult conversations are easier when you have a plan. Use this to bring order and care to a sensitive season.

InheritGuard Partners

Coordination. Collaboration. Continuity.

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LEGAL AUTHORITY

- Durable financial power of attorney in place
- Healthcare proxy / medical power of attorney named
- Advance directives documented and shared
- HIPAA authorizations completed

CARE PLANNING

- Long-term care preferences discussed
- Long-term care funding strategy considered
- In-home vs. facility options explored
- Primary caregiver and backup identified

FINANCIAL INVENTORY

- Accounts, income sources, and debts inventoried
- Insurance policies located and reviewed
- Important documents gathered in one place
- Trusted advisors and contacts listed

FAMILY COORDINATION

- Family meeting held to align expectations
- Responsibilities clearly assigned
- Wishes documented to reduce future conflict

Next Step — Schedule a Private Review

Coordinate care, legal, and financial decisions before a crisis forces them. Visit ericrodriguez.co/private-review.

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