

# PARENT CHECKLIST

## ESTATE

- Do they have a trust in place?
- Is it up to date and comprehensive?
- Have they funded their trust?
- Do you have copies?

## FINANCIAL

- Do they have a financial advisor?
- When was the last time they had a financial checkup?
- Is in home care or assisted living part of their financial portfolio?

## HOUSING

- Is their home paid for?
- Are taxes and insurance included in payment if they have a mortgage?
- If it is paid for, are the tax payments part of their financial plan as well as insurance?
- Are they keeping up with home maintenance?
- Have you had the family discussion regarding moving to a retirement community or aging in place?

## SAFETY AND SECURITY

- Have you gone through their home and checked for safety hazards?
- Do you know all the potential hazards?

## PERSONAL

- Do you know where all their important documents are kept?
- Do you know how they pay their bills, and would you be able to take over if needed?