



Barbara McVicker

ELDERCARE EXPERT | NATIONAL SPEAKER | AUTHOR

Call to Action[©]

When will you take action?

Seven Medical and Legal Documents (signed and notarized)	Now	4 Month	1 Year
➤ Wills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Financial Durable Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Trusts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Durable Power of Attorney for Health Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Do Not Resuscitate (DNR) as applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ HIPAA privacy forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Living Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Information			
➤ Medical history	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Medications (names and dosages)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Information			
➤ Financial and legal advisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Neighbors, friends, landlord, church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Doctors, hospital, pharmacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Important Cards – front and back			
➤ Insurance (health, car, home, life, long term care)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Medicare/Medicaid/VA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Social Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other			
➤ Duplicate keys: house, car, safe deposit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Listing of assets: home, investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Listing of liabilities: mortgages, loans, taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Accounts: bank, brokerage (have trustee name added)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Phone book for your parents' community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Copies of birth, marriage, and death certificates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Copies of military records, deeds, auto titles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
➤ Funeral arrangements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>