Important Documents Checklist

Finding out which papers exist, where they are and what's missing

For: _____ **Date filled in:** _____

Item	Do we have it?	Date completed	Who's named (and the backup)
Financial power of attorney			
Health care proxy			
Living will			
HIPAA authorization			
Will			
Trust (if any)			
POLST or MOLST (if serious illness or advanced frailty)			
Social Security advance designation			
Trusted contact (brokerage or bank)			

Item	Where the original is	Who has copies	Review by
Financial power of attorney			
Health care proxy			
Living will			
HIPAA authorization			
Will			
Trust (if any)			
POLST or MOLST (if serious illness or advanced frailty)			

Check each document

- Does it name someone who has died, divorced or moved away?
- Is there a backup?
- Was it signed in the state where your parent lives now?
- Does the doctor have the proxy and the HIPAA form? Does the bank have the power of attorney?

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- For the power of attorney: does it say it's durable? Does it start now or only later?
- Has the HIPAA form expired?
- If there are newer papers, have the old ones been cancelled?

Questions for the lawyer (for your parent to ask, or for you to ask with them)

1. Which papers does my parent need in our state?
2. When does the power of attorney take effect, and what triggers it?
3. What can the agent do, and what can't they do?
4. How must the papers be signed and witnessed here?
5. Will you meet with my parent alone?
6. What is your fee, and is it flat or hourly?
7. What happens if my parent later can't make decisions?
8. Do my parent's old papers still work, and how do we cancel any we're replacing?

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