



## Essential Information to Gather from Your Parents

While no one wants to think about a parent becoming incapacitated, taking steps to prepare now can help reduce confusion when the time comes.

After you've discussed how your parents want their financial and health care matters handled if they are unable to care for themselves, you'll want to gather relevant documents and information. These will aid you in future conversations with care providers, financial institutions and insurance companies. Remember this list is just a start — your parents' situation may require additional relevant information.

- Location of estate planning documents, including a:
  - will
  - living will (or advance medical directive)
  - health care power of attorney (or health care proxy)
  - durable power of attorney for property and finances
- Location of safe deposit boxes and keys (and permission for you to access the safe deposit boxes)
- Social Security numbers
- Birth and marriage certificates
- Deeds to property and cemetery plots
- Vehicle titles and registration
- Sources of income and assets, such as bank accounts, retirement funds, IRAs, 401(k)s and pensions
- Insurance policies
- Contact information for financial advisors (and permission for the advisor to speak with you about your parents' finances)
- Contact information for doctors and pharmacies (and permission for physicians to speak with you about your parents' care)
- List of medications and dosages



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