

Documents You'll Need to Manage Your Care Recipient's Finances:

Family caregivers are often called on to manage a loved-one's finances and/or adjust to reduced income and increased expenses in their own household. One of the most important things you can do once you've taken on this role is to get organized and make sure you have access to the following important documents.

Checklist

Important legal documents

- Power of attorney
- Living will
- Will
- Trust documents

Important financial documents

- Bills
 - Utilities
 - Household maintenance payments
 - Medical fees
 - Other recurring expenses

Documents You'll Need to Manage Your Care Recipient's Finances: *Continued*

- Deeds
- Mortgage papers and ownership statements
- Loan agreements
- Stock and bond certificates and statements
- Pension, 401(k) and other retirement benefit statements
- Bank and brokerage account information
- Insurance policies
 - Long-term disability
 - Healthcare
 - Home
 - Auto, etc.
- Social Security payment information if Social Security or Social Security disability already has been secured
- Pay stubs if the individual was working prior to the impairment
- State and federal income tax returns
- Medical records