FROM THE SITTING ROOM SERIES
PLANNING AHEAD

4

Before It's Urgent

A Workbook for Papers, Decisions, and Conversations

Stephen Deason

LARGE PRINT

Worksheets

from

Before It's Urgent

A Workbook for Papers, Decisions, and Conversations

Book 4 of The Sitting Room Series



Alder Creek
EDITIONS

About these worksheets

These are the 16 worksheets from Before It's Urgent. Print as many copies as you need. Each one names the chapter that explains it.

The whole book is free to download and print at aldercreekeditions.com.

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General information, not medical, legal, or financial advice. In an emergency, call 911. In a crisis, call or text 988.

What matters most to you

If I could not speak for myself, the person I would want to decide for me is

The person I would want next, if the first could not

Where I want to live, and what would make me willing to move

What I would want my doctors to know about the treatment I would and would not want

Who I trust with money, and who I do not

What I want my family to know, so they do not have to guess

Who knows where these papers are

The person who knows where this workbook is kept

Their phone number

Where the original papers are kept

Where the papers are

Paper	**Date signed**	**Where the original is**	**Who has a copy**
Advance directive or health care proxy			
Living will (if separate)			
POLST or do-not-resuscitate order			
HIPAA authorizations			

Where the papers are

Paper	Date signed	Where the original is	Who has a copy
Power of attorney for money and property			
Will			
Revocable living trust			
Transfer-on-death deed			
Beneficiary forms			

Personal papers

Birth certificate, marriage and divorce papers, military discharge papers, Social Security and Medicare cards (where they are kept, not the numbers), passports. On each page, the first column says whose it is, so a couple can share the pages. If one of you handles the money, fill these in together.

Whose	What it is	Where it is kept	Who else knows

Bank and credit accounts

Bank, kind of account, last four digits only.

Whose	What it is	Where it is kept	Who else knows

Retirement accounts, pensions, and benefits

IRAs, 401(k)s, pensions, annuities, Social Security, VA benefits.

Whose	What it is	Where it is kept	Who else knows

Insurance

Health, Medicare plans, long-term care, life, home, car. Note the agent's name.

Whose	What it is	Where it is kept	Who else knows

Property, vehicles, and safe deposit box

Deeds, titles, the safe deposit box, and where its key is.

Whose	What it is	Where it is kept	Who else knows

Debts and regular bills

Mortgage, loans, credit cards, utilities, and bills paid automatically.

Whose	What it is	Where it is kept	Who else knows

Online accounts and devices

Email, phone, computer, banking apps, photos. Where the passwords are kept, never the passwords.

Whose	What it is	Where it is kept	Who else knows

Advisers

Who	Name	Phone
Attorney		
Accountant or tax preparer		
Financial adviser		
Insurance agent		
Banker		
Doctor		
Clergy		

Pets

Each pet, its veterinarian, its food and medicines, and who has agreed to care for it

Your wishes

Burial, cremation, or something else, and where

The service I would like, if any, and who should lead it

Who should be called first

Anything I have already arranged or paid for, and where the papers are

Review Dates

Look at these papers again every few years, and after a move, a marriage, a divorce, a death in the family, or a new diagnosis. Date each review.

Date	What I reviewed	What I changed	Who I told

Your state's numbers

The Eldercare Locator, 1-800-677-1116, can give you most of these numbers.

Elder law attorney (naela.org)

Legal aid, or senior legal help (lsc.gov)

SHIP, for Medicare counseling (1-877-839-2675)

Probate court, or the court that handles estates

Advance directive form (aarp.org or caringinfo.org)

Adult Protective Services

Area Agency on Aging
