



FIRST Step Pre-Planning Guide

Legal Matters

___ Health Care Surrogate

Who do you want to make your health care decisions if you are suddenly unable?

___ Durable Power of Attorney and Pre-Guardianship Appointment

Who would you like to be your Guardian if you were unable to care for yourself?

Who would you like to step in to help you if you could not help yourself?

___ Living Will

Are your preferences for living and advanced care planning, defined, documented and communicated to your family?

___ Estate Planning -Will

Have you established a Last Will and Testament and had it registered with the court?

___ Financial Designee to help pay bills and manage money

Do you have another signer on your checking account and other financial accounts? Do you have a list of your accounts and how they are accessed?

___ Do you have a list of your re-occurring bills? (phone, car, mortgage, cable)

Family Matters

___ Back up plans

If a crisis happens such as a hurricane or fire, or medical crisis, what is the family back up plan? Who helps? Make a list of items to throw in a suitcase in case of an emergency evacuation. (medicines, clothing, snacks, water, important papers)

___ Do you have a list of doctors, allergies, major illnesses and surgeries all in one place?

Do you have a list of critical health appointments?

___ Who is your I.C.E. ("in case of emergency")? Is it plugged into your cell phone?

___ Do you have your insurance policies all in one place? (House, medical, life, care, prescription)

___ Do you know the signs of Memory Impairment?

For the next step and additional information,
contact Jamie Glavich. Jamie@almosthomeseniorservices.com or 904-731-4002.

www.almosthomeseniorservices.com