

ELDERCARE PLANNING CHECKLIST

100 QUESTIONS TO HELP YOU
PLAN WITH CONFIDENCE



Eldercare Planning Checklist

Legal & Essential Documents

- ☐ 1. I have created my will.
- ☐ 2. I have named and informed my executor.
- ☐ 3. I have completed my Power of Attorney for Property.
- ☐ 4. I have completed my Power of Attorney for Personal Care.
- ☐ 5. I have created my Advance Care Plan or Living Will.
- ☐ 6. I have registered my organ donation decision.
- ☐ 7. I have organized and recorded access to my digital accounts.
- ☐ 8. I have discussed my wishes with my appointed attorney
- ☐ 9. I trust the person(s) I appointed, and reviewed responsibilities with them
- ☐ 10. My will is stored safely and accessible to my Executor

Financial Planning

- ☐ 11. I have created a list of my assets and debts.
- ☐ 12. I have created a monthly budget for my expenses.
- ☐ 13. I have documented all my retirement income sources.
- ☐ 14. I have confirmed my CPP and OAS benefits.
- ☐ 15. I have reviewed and updated my RRSPs or RRIFs.
- ☐ 16. I have reviewed my TFSA accounts.
- ☐ 17. I have updated my life insurance policies.
- ☐ 18. I have reviewed my long-term care insurance (if applicable).
- ☐ 19. I have pre-planned and/or prepaid for my funeral (if applicable).
- ☐ 20. I have written down my funeral or burial preferences.

Banking & Money Access

- ☐ 21. I have added joint account holders (if appropriate).
- ☐ 22. I have set up automatic bill payments.
- ☐ 23. I have shared my online banking access with my POA (if needed).
- ☐ 24. I have organized access to my safe deposit box.
- ☐ 25. I have reviewed and simplified my credit cards and loans.

Health & Medical

- ☐ 26. I have made a list of my current medications.
- ☐ 27. I have written down my doctors' and specialists' contact information.
- ☐ 28. I have documented my medical history and diagnoses.
- ☐ 29. I have ensured my OHIP (or provincial health) card is current.
- ☐ 30. I have reviewed any private health insurance.
- ☐ 31. I have a dental care plan in place.
- ☐ 32. I have made plans for regular vision and hearing checkups.
- ☐ 33. I have arranged for any necessary mobility or medical equipment.
- ☐ 34. I have posted my emergency contact information.
- ☐ 35. I have listed any allergies or medical alert information.

Housing Plans

- ☐ 36. I have done a home safety check.
- ☐ 37. I have decided whether to stay home or move.
- ☐ 38. I have researched retirement residences and long-term care homes.
- ☐ 39. I have started applications or joined waitlists (if needed).
- ☐ 40. I have made a downsizing or moving plan.
- ☐ 41. I have organized important keepsakes and documents.
- ☐ 42. I have arranged for cleaning or home maintenance help.

- ☐ 43. I have arranged for snow removal and lawn care.
- ☐ 44. I have installed an emergency call system (if needed).
- ☐ 45. I have set up a plan for forwarding or managing my mail.

Caregiving Support

- ☐ 46. I have named my primary caregiver.
- ☐ 47. I have named a backup caregiver.
- ☐ 48. I have discussed care roles with family or friends.
- ☐ 49. I have arranged for professional in-home care (if needed).
- ☐ 50. I have created a regular care schedule.
- ☐ 51. I have gathered information about respite care options.
- ☐ 52. I have identified relevant support groups.
- ☐ 53. I have written down important care instructions.
- ☐ 54. I have listed my personal care needs.
- ☐ 55. I have created an emergency care plan.

End-of-Life Wishes

- ☐ 56. I have documented my preferences for funeral arrangements.
- ☐ 57. I have decided on burial or cremation.
- ☐ 58. I have prepared notes or ideas for my obituary (optional).
- ☐ 59. I have created legacy letters or videos (optional).
- ☐ 60. I have confirmed that my executor understands their role.
- ☐ 61. I have written down my final instructions.
- ☐ 62. I have made a plan for closing digital/social media accounts.
- ☐ 63. I have outlined any memorial or service preferences.
- ☐ 64. I have told loved ones where to find key documents.

- ☐ 65. I have ensured funds or access are available to those who need them.

Emotional & Family Planning

- ☐ 66. I have spoken to my family about my wishes.
- ☐ 67. I have preserved my photo albums and keepsakes.
- ☐ 68. I have shared or recorded family traditions and values.
- ☐ 69. I have made plans to continue hobbies or volunteering.
- ☐ 70. I have started a life story or journal.
- ☐ 71. I have noted my religious or cultural preferences.
- ☐ 72. I have found mental health support if I need it.
- ☐ 73. I have listed friends, neighbours, or support people.
- ☐ 74. I have a regular plan to stay socially connected.
- ☐ 75. I have made time for emotional check-ins.

Everyday Living

- ☐ 76. I have set up grocery or meal delivery (if needed).
- ☐ 77. I have help with cleaning and laundry.
- ☐ 78. I have transportation or ride services arranged.
- ☐ 79. I have a visible calendar for appointments.
- ☐ 80. I have a medication reminder system.
- ☐ 81. I have made my home easy and safe to move around in.
- ☐ 82. I have emergency contacts posted in my home.
- ☐ 83. I have clothing and personal items I need for the season.
- ☐ 84. I have a list of favourite activities or routines.
- ☐ 85. I have stored my personal documents in one spot.

Pets & Belongings

- ☐ 86. I have a daily care plan for my pet(s).
- ☐ 87. I have my vet's information recorded.
- ☐ 88. I have a backup caregiver for my pet.
- ☐ 89. I have sorted and organized my belongings.
- ☐ 90. I have given special items to those I want to have them.
- ☐ 91. I have listed and stored any valuables.
- ☐ 92. I have protected and stored my photo albums.
- ☐ 93. I have donated or given away things I no longer use.
- ☐ 94. I have a plan for my pet during a move or emergency.
- ☐ 95. I have written out my pet's routine and needs.

Communication & Ongoing Planning

- ☐ 96. I have reviewed this checklist recently.
- ☐ 97. I have shared my plan with trusted family or friends.
- ☐ 98. I have given copies of key documents to my POA and executor.
- ☐ 99. I have had a family meeting to talk about my care.
- ☐ 100. I have a reminder to revisit and update my plan regularly.