Future Incapacity Planning Checklist

1. Legal & Estate Planning

☐ **Durable Power of Attorney (POA)** – Assigns someone to handle financial matters
☐ **Healthcare Power of Attorney (Medical POA)** – Assigns someone to make medical decisions
☐ **Advance Healthcare Directive (Living Will)** – Outlines medical treatment preferences
☐ **HIPAA Authorization** – Allows designated individuals to access your medical records
☐ **Revocable Living Trust** (if applicable) – Helps manage assets without probate while the principal is living when a successor trustee is named
☐ **Will & Beneficiary Designations** – Ensure assets are distributed according to your wishes
☐ **Digital Legacy Designation** – Ensure someone controls smartphones**,** social media**,** photos, and other online presence after death

2. Financial & Asset Organization

☐ List **bank accounts, investments, and retirement accounts**.
☐ Ensure **beneficiaries** on financial accounts and insurance policies are updated.
☐ Organize and securely store **legal and financial documents**.
☐ Set up **automatic payments** for essential bills and expenses.
☐ Ensure your appointed financial POA, or successor trustee, has access to necessary accounts, possibly through access to your password manager

3. Healthcare & Long-Term Care Planning

☐ Choose preferred **medical providers and facilities**.
☐ Research and consider **long-term care insurance**.
☐ Explore **Medicaid planning** if long-term care may be needed.
☐ Discuss **care preferences** (home care, assisted living, nursing home).

4. Emergency & Communication Plan

☐ Share plans with **family members, legal representatives, and caregivers**.
☐ Create a **list of key contacts** (family, lawyer, financial advisor, doctors).
☐ Ensure decision-makers know where to find important documents and can access the password manager
☐ Create a family password to use if possible emergencies arise
☐ Review and update documents **annually or after major life changes**