

## **THE CRISIS VISIT WITH AGING PARENTS \***

Do you worry about receiving **THE CALL**—the call that tells you your out-of-town parents are in crisis? Do you know what to do on short notice for a short-term visit? Although we hope never to receive this call, here are:

### **“The Top Ten Things To Do: A Crisis Visit With Aging Parents”**

1. Look for Health Care Directives and Powers of Attorney. If your parents don't have these documents, are strong enough and have an attorney, arrange a visit to get these documents prepared.
2. Try to arrange for at least one doctor appointment and get medical decision-making authority. Make a list of medications (and supplements) and the prescribed dosages.
3. Look for Will and Trust documents. If your parents don't have these documents, do **not** try to arrange for an attorney visit. Getting these documents prepared should not be done on a short-term visit.
4. If your parents are strong enough, take them to their bank and have them give you power of attorney on the account(s) so you can pay bills and monitor transactions. If there's more than one bank and if you have limited time and/or if your parents don't have the strength, go to the bank where they have their “everyday” checking account.
5. Look for bank, investment and brokerage account statements; retirement plan/pension documents; life insurance policies and annuity contracts, and long-term care insurance policies. Look for beneficiary designations for these assets.
6. Look for user names and passwords for online accounts. Print out the most recent account statements. Delete/disable online shopping accounts.

7. Get Social Security and Medicare numbers. Get supplemental medical insurance account numbers.
8. Look for the previous year's income tax returns (and 1099s). On the federal return, look for Schedule B (interest/dividends) and Schedule D (capital gains and losses).
9. Make a list of neighbors and friends, and their telephone numbers.
10. Get rid of throw rugs!

You likely won't be able to get all of these tasks done on a short-term visit. Prioritize those that are most important in your parents' situation.

This is not easy. Just do the best you can.

**\* This handout is not legal or tax advice. Receiving/reviewing this handout does not create an attorney-client relationship.**

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