

Step-by-Step Legal Checklist for Dementia Caregivers



Step 1: Gather Essential Documents

- Birth certificate & Social Security card
- Marriage, divorce, or military records
- Insurance policies & financial accounts
- Property deeds & titles

Step 2: Establish Decision-Making Authority

- Durable POA: Assign financial decision-maker
- Healthcare POA: Assign medical decision-maker
- Living Will: Outline medical & end-of-life preferences
- HIPAA Authorization: Allow medical record access
- Guardianship (if needed): Legal authority for advanced dementia

Step 3: Review & Update Financial Plans

- List all financial accounts & set up auto-pay
- Review beneficiaries on insurance & investments
- Consult an advisor for trusts & Medicaid planning

Step 4: Estate Planning

- Create or update a Last Will & Testament
- Consider trusts to manage assets & avoid probate
- Plan funeral & burial preferences

Step 5: Legal Protections & Safeguards

- Register with emergency services if at risk of wandering
- Understand elder abuse laws & reporting methods
- Review long-term care policies & Medicaid eligibility
- Store legal documents in a safe but accessible place

Step 6: Review & Update Regularly

- Schedule annual reviews of legal documents
- Update plans as dementia progresses
- Stay informed on changing state laws

The information contained in this checklist is for general educational and informational purposes only and should not be construed as legal advice, financial advice, health advice, or medical advice. The information provided is not a substitute for advice from a qualified professional who is aware of the facts and circumstances of your individual situation. We expressly recommend that you seek advice from a professional familiar with your specific situation.