

Detailed List of Important Information to Collect When a Family Member Has Been Diagnosed with

Cognitive Impairment



When a family member is diagnosed with cognitive impairment, it's important to have a conversation with your loved one and collect important information that will help you and your loved one should they come to a point where they can no longer handle their affairs for themselves. Do it early before your loved one forget or is unable to help with the process.

For a great book on how to have start the conversation with your loved one, refer to *The Parent Care Conversation: 11.5 Strategies for Transforming the Emotional and Financial Future of Your Aging Parents.*



The list below is inspired by the book and taken from my personal experiences with my dad and stepmother. I hope you never need to collect this documentation. But if you do, I pray this list will help you care for your loved one in your time of need.

Kelly

Financial



- Bank information – institutions, account numbers, balances
- 401K, IRA or other retirement accounts
- Financial advisor name and contact information if they have one
- CPA name and contact information if they have one
- Other stocks and assets
- Is there a mortgage? Mortgage company name and account number. Is the mortgage close to being paid off?
- What debts do they have? Car loans, credit cards, second mortgage, other loans?
- Who are the debts with? Account numbers and contact information

Income




- Where are social security checks and retirement check deposited?
- What are the amounts of social security checks and retirement checks?
- Do they take a distribution from a 401K or other retirement account?
- How often do they take a draw? For how much? What's the balance?

Insurance Policies

- Life Insurance – Company or companies, policy numbers, contact information, how are they paid?
- Car Insurance – Company, policy number, contact information
- Homeowners Insurance – Company, policy number, contact information
- Long Term Care Insurance – Company, policy number, contact information
- What does the long-term care cover? For how much and for how long?
- Do they have policy for their funeral or burial arrangements?

Other Assets

- ===== Cash on hand
 - ===== Real estate
 - ===== Art
 - ===== Antiques
 - ===== Vehicles
 - ===== Jewelry
 - ===== Rare coins
 - ===== Collectibles
 - ===== Heirlooms
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Documents in Place

- ===== Do they have a will or a trust in place? Where is the will? What accounts and assets are part of the trust?
- ===== Do they have medical directives in place – if so, with whom?
- ===== Do they have a durable power of attorney in place – if so, with whom?
- ===== Seek counsel of an experienced estate planning and/or elder law attorney for guidance

Device Passwords

- ===== Collect a list of all the electronic devices – computers, cell phones, tablets, etc. – and store their pass codes / log on information in a safe location.