10 Things to Discuss Before a Crisis Happens

Use this checklist to begin a calm, practical conversation about an aging parent before decisions become urgent.

Wise Moves Advisors

☐ 1. Legal authority

Do we have current financial and health care powers of attorney, and does the right person know where they are?

☐ 2. Important documents

Can we quickly find identification, insurance, financial, legal, property, and end-of-life documents?

☐ 3. Living preferences

Have we discussed where they want to live and what support would help them remain safe and independent?

☐ 4. Finances and benefits

Do we understand income, expenses, accounts, insurance, long-term care coverage, and available benefits?

☐ 5. Doctors and medications

Is there one current list of doctors, diagnoses, medications, allergies, and pharmacy information?

☐ 6. Home safety

Is the home safe for mobility, bathing, stairs, lighting, emergencies, and future care needs?

☐ 7. Driving and transportation

What signs would prompt a driving conversation, and what transportation options could replace driving?

☐ 8. Support network

Who can help with meals, appointments, household tasks, companionship, technology, or regular check-ins?

☐ 9. Caregiver plan

If one family member becomes the main caregiver, how will time, costs, decisions, and respite be shared?

☐ 10. Emergency plan

If something happened tomorrow, does everyone know who to call, where the important information is, and what your parent wants?

Start with three

Check the three areas your family should discuss first. You do not have to solve everything today.

Not sure where to start?

Wise Moves Advisors helps families understand their options, organize next steps, and connect with trusted local resources.

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- Senior Living Placement
- In-Home Care Support
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Schedule a No-Fee Consultation

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