

## ACTION PLAN FOR FINANCES

Having a conversation about finances can be difficult and stressful. The more prepared you are, the less anxiety for both of you.

What are the goals you hope to accomplish during the conversations?

Review the list of financial documents. Check the ones that are applicable for your situation:

**Social Security Information**

**Income Sources/Assets:**

Pension

IRA

401(k)

CDs

Other \_\_\_\_\_

**Insurance Information:**

Home: policy # \_\_\_\_\_ Agent/phone: \_\_\_\_\_

Car: policy # \_\_\_\_\_ Agent/phone: \_\_\_\_\_

Life: policy # \_\_\_\_\_ Agent/phone: \_\_\_\_\_

Long Term Care: policy # \_\_\_\_\_ Agent/phone: \_\_\_\_\_

**Health Insurance/Medicare:**

policy # \_\_\_\_\_ Agent/phone: \_\_\_\_\_

**Bank Names/Account Numbers/Passwords:**

Checking: \_\_\_\_\_

\_\_\_\_\_

Savings: \_\_\_\_\_

\_\_\_\_\_

**Safe Deposit Box/Key and Location:** \_\_\_\_\_

Stocks/Bonds/Property (include any names/phone numbers associated):  
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Income Tax Return (most recent)

Deed for Home (original)/Location \_\_\_\_\_

Car Title/Registration

Credit or Debit Cards (names and numbers, **passwords**):  
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Advance Directives:  
Will  
Living Will  
Power of Attorney  
Living Trust

Liabilities:  
Property Tax (amount owed, date due, etc.):  
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Mortgage: \_\_\_\_\_  
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List others who may need to be involved in the conversation (family members, friends, trusted advisor):

\_\_\_\_\_

\*Organizing all relevant paperwork in one place and setting up autopay for recurring bills will give you as the caregiver peace of mind and a sound understanding of the financial situation.