



Peace of Mind Planning: An Incapacity Checklist for Maine Families

Print this and keep it with your important papers.

1) Choose the right people

Health Care Agent (Primary): _____

Phone: _____ Relationship: _____

Health Care Agent (Backup): _____

Phone: _____ Relationship: _____

**Financial Agent under Durable Power of Attorney
(Primary):** _____

Phone: _____ Relationship: _____

Financial Agent (Backup): _____

Phone: _____ Relationship: _____

I talked with my agents about my wishes and they agreed to serve.

2) Complete Maine incapacity documents

Maine Advance Health Care Directive completed (Health Care Proxy + instructions).

Durable Power of Attorney completed (financial decision-maker).

I reviewed whether I want these powers to be **effective immediately** or **upon incapacity** (ask your attorney what is best for your situation).

3) Write down “in a crisis” instructions

My primary doctor’s name: _____ Phone: _____

Preferred hospital/medical system: _____

Key medical notes (allergies, conditions, medications, implanted devices):

My care preferences (check any that apply):

I want my agents to prioritize comfort if recovery is unlikely.

I want all reasonable treatment unless my directive says otherwise.

I want my family included in updates, but my agent makes final decisions.

Who should be kept informed?

Name: _____ Phone: _____ Relationship: _____

Name: _____ Phone: _____ Relationship: _____

4) Make finances easier for your agent

I listed where my money comes from (Social Security/pension/other):

I listed my main accounts (bank, investments, retirement):

I listed regular bills that must be paid (mortgage/rent, utilities, insurance, care costs):

I listed important contacts (CPA, financial advisor, insurance agent):

5) Store documents where people can actually find them

Where originals are stored: _____

Who has access: _____

Copies provided to:

Health Care Agent(s) Financial Agent(s) Primary Care Office (if desired)

Emergency contact sheet location (fridge, folder, phone note): _____

6) Review schedule (don't set it and forget it)

I will review these documents: yearly every 2–3 years after major life changes

Update triggers (check any):

New diagnosis Divorce/marriage Death of an agent Move New assets New care plan

Last updated (date): ____ / ____ / _____

Optional: Quick “What If?” Self-Check

If I was hospitalized today, someone I trust could legally speak with my doctors.

If I couldn't pay bills for 60 days, someone could legally step in immediately.

My family would not have to go to Maine Probate Court for authority.

NOTES:

Legal Disclaimer: This material is for general informational purposes only and does not constitute legal advice. No attorney-client relationship is created by the use of this checklist. This checklist is not a substitute for legal counsel and should not be relied upon as a legal document.

Individuals seeking legally binding estate planning or incapacity planning documents should consult a licensed estate planning or elder law attorney in the State of Maine.