



Parkinson's Estate Planning Checklist

1. Core Legal Documents

Last Will & Testament

Trust (if applicable)

Durable Financial Power of Attorney

Healthcare Power of Attorney / Advance Directive

HIPAA Authorization

2. Plan for Incapacity

Financial decision-maker chosen
Name: _____

Backup financial decision-maker chosen
Name: _____

Healthcare decision-maker chosen
Name: _____

Backup healthcare decision-maker chosen
Name: _____

Care preferences documented

Details:

3. Long-Term Care Planning

Preferred type of care identified

Cost concerns reviewed

Planning steps taken (attorney, financial plan, etc.)

4. Asset & Financial Review

Assets inventoried

Debts and liabilities listed

Beneficiaries reviewed and updated

Yes No

Notes

5. Key Decision-Makers

Executor selected

Name: _____

Trustee(s) selected

Financial Agent (POA) selected

Healthcare Agent selected

Backup decision-makers selected

6. Family Communication

Plan discussed with family

Document locations shared

Roles and expectations clarified

Notes

7. Living & Care Preferences

Living preferences documented

Home modifications considered

Transportation plan created

8. Personal Instructions & Legacy

Funeral / burial wishes documented

Legacy messages prepared

Sentimental items assigned

Charitable giving planned

9. Organization

Documents stored in one place

Location: _____

Key contacts listed

Copies provided to trusted individuals

10. Ongoing Review

Plan reviewed recently

Last review date: _____

Next review scheduled

Next review date: _____

Updates identified

Optional: Stage-Based Planning

Early-stage planning completed

Notes

Mid-stage adjustments made

Advanced-stage planning addressed

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.