

- DISCLAIMER -

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## CARING FOR YOUR ELDERLY RELATIVES

### BEING A GUARDIAN—DOCUMENTS TO GATHER

If you are the guardian of an elderly relative, you are responsible for the management and safety of that relative's assets. As such, you must gather all the important documents needed to manage those assets. In doing so, you may find the checklist below helpful in creating your own personal Document Checklist.

Because laws that impose responsibilities on guardians must be carefully followed, your attorney should assist you in clearly understanding your legal responsibilities as a guardian and the proper execution of those responsibilities.

*Notes:*

- |  |       |
|--|-------|
| <input type="checkbox"/> Power of Attorney   | _____ |
| <input type="checkbox"/> Living Will         | _____ |
| <input type="checkbox"/> Guardianship Papers | _____ |
| <input type="checkbox"/> Trust Documents     | _____ |
| <input type="checkbox"/> Deeds               | _____ |
| <input type="checkbox"/> Land Grants         | _____ |
| <input type="checkbox"/> Water Rights        | _____ |
| <input type="checkbox"/> Mortgages           | _____ |
| <input type="checkbox"/> Leases              | _____ |
| <input type="checkbox"/> Bonds               | _____ |
| <input type="checkbox"/> Loans               | _____ |
| <input type="checkbox"/> Contracts           | _____ |
| <input type="checkbox"/> Tax Notices         | _____ |
| <input type="checkbox"/> Abstracts of Title  | _____ |
| <input type="checkbox"/> Vehicle Titles      | _____ |
| <input type="checkbox"/> Bank Statements     | _____ |
| <input type="checkbox"/> Pass Books          | _____ |
| <input type="checkbox"/> Checkbook Registers | _____ |

- \_\_\_\_ Mutual Fund Statements \_\_\_\_\_
- \_\_\_\_ IRA Statements \_\_\_\_\_
- \_\_\_\_ Stock Certificates \_\_\_\_\_
- \_\_\_\_ Canceled Checks \_\_\_\_\_
- \_\_\_\_ Bills \_\_\_\_\_
- \_\_\_\_ Receipts \_\_\_\_\_
- \_\_\_\_ Check Stubs \_\_\_\_\_
- \_\_\_\_ Social Security Documents \_\_\_\_\_
- \_\_\_\_ Retirement Papers \_\_\_\_\_
- \_\_\_\_ Pension Documents \_\_\_\_\_
- \_\_\_\_ Income Tax Returns \_\_\_\_\_
- \_\_\_\_ Will \_\_\_\_\_