

Legal Documents Checklist for Assisted Living Transitions

For Adult Children Assisting Their Parents

To ensure a smooth and legally compliant transition to assisted living, adult children should gather the following legal documents before beginning the move-in process. These documents help with medical decisions, financial management, and day-to-day responsibilities.

Essential Legal Documents:

- ☐ Durable Power of Attorney (POA) – for financial and legal matters
- ☐ Healthcare Power of Attorney (Medical POA) – for medical decisions
- ☐ HIPAA Authorization – to access health information
- ☐ Living Will / Advance Directive – for end-of-life preferences
- ☐ Guardianship/Conservatorship – only if no POA exists and parent is incapacitated
- ☐ Government-issued ID – such as a driver's license or state ID
- ☐ Medicare, Medicaid, or insurance cards – for billing and coverage
- ☐ Social Security card or number – often needed for identification and benefits



Additional Tips:

- Ensure all documents are signed, dated, and notarized.
- Store copies in both physical and digital formats.
- Review documents regularly to keep them up to date.

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