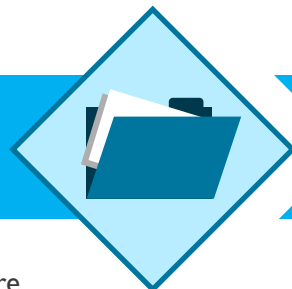


Post Diagnosis Checklist



The following steps now, while your spouse is still able to assist, will help avoid many future problems and challenges. This template can be used as a checklist for documents you should store securely and share with others. Always keep original documents. Make copies of the most important ones (marked with an *) and have them certified. Store these separately, such as in a safe deposit box.

Document	Share with
<input type="checkbox"/> Power of Attorney for Finances	Add name(s)
<input type="checkbox"/> Power of Attorney for Health Care	Add name(s)
<input type="checkbox"/> Durable Power of Attorney for Health Care You need to have the right to make all medical decisions when your spouse is no longer able. These forms will give you a variety of options, pick which option you feel is best for you and your spouse.	Add name(s)
<input type="checkbox"/> Financial Information Obtain USERNAMES and PASSWORDS for all bank accounts, credit cards and all other financial and personal accounts. These will be forgotten if not obtained immediately. Have multiple copies and place them in several different places around your home.	Add name(s)
<input type="checkbox"/> Financial Bills of Household Familiarize yourself with BILLS of the household, payment due dates, and how the bills are paid. Prepare yourself to take over the payment of household bills, taxes, etc. This will avoid late payments and defaults which can change many GBM households. You may need to hire a bookkeeper or accountant to assist you.	Add name(s)
<input type="checkbox"/> Avoid Probate if Able This requires that everything be placed as JOINT TENANTS WITH RIGHTS OF SURVIVORSHIP. Title to homes, cars, bank accounts include every asset of marriage. Probate is expensive and delays transfer of assets. Exercise caution and consult an attorney if your spouse has individual debts prior to exercising this option.	Add name(s)

☐ Will or Trust

Add name(s)

Have a current Will or Trust. The will can be very simple. Leaving everything to the surviving spouse. If substantial assets exists, or financial affairs seem complicated, a TRUST may be recommended. Consult an attorney.

☐ Life Insurance

Add name(s)

Locate all LIFE INSURANCE policies and make certain the beneficiary designation is correct.

☐ Support for Self

Add name(s)

Get SUPPORT for YOU and line up possible assistants, caregivers, family members, friends whom may be able to assist you as the disease progresses. You will need help with care in the future. If care at home is not possible, research possible facilities early in diagnosis. Familiarize yourself with the care that will eventually be needed so that the best preparations can be made for both you and your spouse.