



CENTER FOR FINANCIAL PLANNING, INC.
Independent Registered Investment Advisor

Future Care Strategies Checklist

	YES	NO	NOT SURE
Do I know what I am going to do if I get ill and can no longer care for myself?			
Is my family aware of my wishes for long term care, terminal treatment and funeral services?			
Are my financial affairs organized so that someone could take over if I am incapacitated?			
Do appropriate members of my family know about my financial affairs?			
Are my legal documents up-to-date and structured to carry out my wishes?			
Have I structured things so that I can avoid being a burden to my children?			
Do I know where to look for professional help, when and if I need it (care professionals, legal professionals, etc.)?			
Can I afford to move to a Continuing Care Community or other Senior Living Community?			
Am I getting all of the benefits that I am entitled to (including Medicare, Social Security and Veterans Benefits)?			
Do I know what services or community resources are available to me?			