

# Independent Living Checklist



Our goal is to help you enjoy your retirement, wherever you call home. Review the steps in this checklist to set yourself up for success. Share this completed checklist and your aging-in-place plan with your family to help alleviate stress and curb any potential arguments that may arise. Go into your retirement with a clear and confident plan!

After you complete this document, be cautious about who you share this information with. The Dorvie team will not need sensitive information (e.g., Birth Certificate, Social Security Number, Citizenship Paperwork, or Bank Account Information) to provide curated home services to you. Instead, we created this document as a resource for retirees considering various living options, from a retirement community to staying in their current home or apartment.

First things first. You'll want to get all your important paperwork together and in one place for easy reference. Make sure to include the following documents:

Item	Located? (Y/N)	Location / Responsible Party	Notes
Birth Certificate			
Social Security Card			
Marriage Certificates			
Death Certificates			
Birth / Adoption Certificates			
Contacts: Next of Kin			
Contacts: Friends / Family			
Contact: Attorney			
Contact: Doctor (GP, PCP)			
Contact: Financial Advisor / Tax Professional			
Contact: Religious Leader			



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You'll also want to make sure you have paperwork for the following items (broken down by category):

## Legal

Item	Located? (Y/N)	Location / Responsible Party	Notes
Home / Property Deeds			
Car Title & Registration			
Will / Trust			

## Financial

Item	Located? (Y/N)	Location / Responsible Party	Notes
Bank Account Info (Account Numbers, Credit / Debit cards)			
401k / Pension Information			
Most Recent Tax Returns			
Investment Income / Stockbroker Contact Info			
Info on Debts Owed (Mortgage, Taxes, Loans, etc.)			



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## Medical

Item	Located? (Y/N)	Location / Responsible Party	Notes
List of Regular Medications			
Medical Insurance Documentation			
Living Will			
Durable Power of Attorney			
DNR / Organ Donation Documentation (if applicable)			
Life Insurance Documentation			
Directives on End-of-Life Care or Final Arrangements			

## Financial

Item	Located? (Y/N)	Location / Responsible Party	Notes
Binder of Appliance Manuals & Warrantees			
Contact Information for Preferred Service Providers			
Records of Service for HVAC / Roof / Large Appliances			
Information on Security Systems (if applicable)			



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## Important Questions to Ask as You Create Your Plan:

What tasks cause the most stress for me? Is there a way I could get more support or outsource these tasks?	
Does my home require any upgrades or changes to accommodate current or potential mobility issues?	
Would my home benefit from smart features? How do I feel about tools like fall sensors and cameras?	
Have I budgeted properly for retirement? Do I need to speak with a financial advisor?	
Are all my legal documents up to date? Do they clearly communicate my wishes?	
Am I up to date on medical checkups? Is there anything I can do to be proactive about staying healthy?	
What is my plan for combating isolation and loneliness? What hobbies or activities can I spend time engaged in?	
How will I get to and from doctor's appointments, church, or other social events? (if no longer driving)	
How will I handle meal planning and grocery shopping?	
Is my home maintenance up to date? Can I do anything preventative now to avoid problems down the road?	