

Choosing a Guardian—Checklist: Documents to Gather

If you are choosing a guardian to handle the personal or financial affairs of a loved one who has been placed in a nursing home, or if you have been named as a guardian for such an individual, it is important to gather all necessary documents so that the guardianship role can be handled efficiently and effectively and your loved one's rights can be fully protected. The list of documents below, while not exhaustive, provides a guide as to what papers should be gathered, whether you are getting them together for a court-appointed guardian, acting as the guardian yourself, or organizing your own financial affairs should you come under a guardianship or conservatorship in the future. Your elder law attorney can advise you in greater detail about the role of a guardian for nursing home residents.

Notes:

- ___ Power of Attorney _____
- ___ Living Will _____
- ___ Guardianship Papers _____
- ___ Trust Documents _____
- ___ Deeds _____
- ___ Land Grants _____
- ___ Water Rights _____
- ___ Mortgages _____
- ___ Leases _____
- ___ Bonds _____
- ___ Loans _____
- ___ Contracts _____
- ___ Tax Notices _____
- ___ Abstracts of Title _____
- ___ Vehicle Titles _____
- ___ Bank Statements _____

- ____ Pass Books

- ____ 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
