

Section 1: Bills and income inventory

Complete by hand, in pencil or pen as the parent prefers. Keep full account numbers, Social Security numbers and passwords off this sheet; a company name and a phone number are enough for a working note.

Whose bills are these

Parent or household

Prepared by

Date prepared

Bill or income item

One block per bill or income item. Copy this page for more items. Autopay appears here only as something the parent may already have chosen; no provider enrollment steps belong on this sheet.

Bill or income item

Company and phone

Amount and cycle

Autopay status: yes / no / who set it up

Where the statement arrives: mail / email / portal

Due date

Section 1: Bills and income inventory (continued)

Bill or income item

Bill or income item

Company and phone

Amount and cycle

Autopay status: yes / no / who set it up

Where the statement arrives: mail / email / portal

Due date

Bill or income item

Bill or income item

Company and phone

Amount and cycle

Autopay status: yes / no / who set it up

Where the statement arrives: mail / email / portal

Due date

Section 2: Permission and authority today

One block per bank, brokerage, or company. Record the status the company confirmed, and what it asked for. What each firm offers differs, so the first question at any bank is what it offers. [A01]

Bank, brokerage, or company

Bank, brokerage, or company

Status today (write one from the choices below)

What the company asked for

Date of this status

Backup person

Status choices: None / Permission-to-talk form on file / Trusted contact on file / View access the bank or brokerage offers / Convenience signer / POA on file with the company / Payee or VA fiduciary for benefits only

Bank, brokerage, or company

Bank, brokerage, or company

Status today (write one from the choices below)

What the company asked for

Date of this status

Section 2: Permission and authority today (continued)

Backup person

Status choices: None / Permission-to-talk form on file / Trusted contact on file / View access the bank or brokerage offers / Convenience signer / POA on file with the company / Payee or VA fiduciary for benefits only

Bank, brokerage, or company

Bank, brokerage, or company

Status today (write one from the choices below)

What the company asked for

Date of this status

Backup person

Status choices: None / Permission-to-talk form on file / Trusted contact on file / View access the bank or brokerage offers / Convenience signer / POA on file with the company / Payee or VA fiduciary for benefits only

Sources for this sheet: A01. Full citations follow.

Section 3: What the parent consents to now

Statement copies and meeting attendance give a helper an overview without giving authority. [A01]

Permission for a bank, card company, insurer, doctor or lawyer to talk with a helper may take a signed form. [A02]

People the parent has named or included

Conversation partners (who joins meetings or calls)

Statement-copy recipients

Whom the bank or brokerage may call

Signed forms on file

Company

Form name

Date signed

Signed forms on file

Company

Form name

Section 3: What the parent consents to now (continued)

Date signed

Sources for this sheet: A01, A02. Full citations follow.

Section 4: What the family will watch

Household observations only. This sheet makes no medical or capacity finding, and it creates no authority.

Watch list

☐ Missed or duplicate payments

☐ Unusual purchases

☐ Unopened mail

Other observations the family will watch (write in)

Who checks, and how often

Section 5: Next authority step if help needs grow

Three ranked lines. The court path is last. Each line names its companion section on the article page.

Step 1: The POA conversation

A bank may refuse a power of attorney and ask for its own form, so raise the acceptance question early, and hand over certified copies rather than the original. (Article section: When a power of attorney is the right step.) [A03]

Notes

Date raised with the parent

Step 2: The benefits payee question, for Social Security or VA income

A power of attorney does not reach Social Security or SSI benefits; appointment by the agency is its own step. (Article section: Social Security and VA benefits follow their own rules.) [A04]

Applies to this household (yes or no)

Notes

Step 3: The court path, last

A guardian or conservator is a court decision, reached when no power of attorney exists and the parent can no longer manage. (Article section: If the parent can no longer decide and no POA exists.) [A01]

Notes

Section 5: Next authority step if help needs grow (continued)

Sources for this sheet: A03, A04, A01. Full citations follow.

Fictional example: one completed sheet

Every entry on this page is invented. Names, banks and companies are fictional; Social Security and VA appear only as program names, never as claims.

Phone numbers use the 555 prefix.

Section 1 example (fictional)

Parent or household: Rosa M. (fictional example)

Prepared by: Daniel R. (fictional)

Date prepared: October 17, 2026 (invented date)

Bill or income item: Electricity

Company and phone: Northgate Power (fictional), 555-0148

Amount and cycle: Monthly; amount comes from the statement

Autopay status: Yes; Rosa set it up

Where the statement arrives: Mail

Due date: The 15th of each month

Section 2 example (fictional)

Bank, brokerage, or company: Harborview Bank (fictional)

Status today: Permission-to-talk form on file

What the company asked for: Rosa's signature on the bank's own form

Date of this status: September 30, 2026 (invented date)

Backup person: Daniel's sister (fictional)

Sections 3 to 5 example (fictional)

Conversation partners: Daniel joins Rosa at the branch

Statement-copy recipients: Daniel R. (fictional)

Whom the bank or brokerage may call: Daniel R. (fictional)

Signed forms on file: Harborview Bank (fictional), permission-to-talk form, September 30, 2026 (invented date)

Fictional example: one completed sheet (continued)

Watch list: Checked: missed or duplicate payments; unopened mail watched since August (invented)

Step 1 notes: POA conversation planned for November; ask Harborview what it accepts

Step 2, applies to this household: No; no Social Security or VA income in this example household

Step 3 notes: Not needed in this example

Sources and official instructions

[A01] Considering a financial caregiver? Know your options. Consumer Financial Protection Bureau. March 2021; checked October 17, 2026.

https://files.consumerfinance.gov/f/documents/cfpb_considering-a-financial-caregiver-know-your-options_guide_2021-05.pdf

[A02] Getting Your Affairs in Order Checklist: Documents to Prepare for the Future. National Institute on Aging. Content reviewed February 1, 2023; checked October 17, 2026.

<https://www.nia.nih.gov/health/advance-care-planning/getting-your-affairs-order-checklist-documents-prepare-future>

[A03] Managing Someone Else's Money: Help for agents under a power of attorney. Consumer Financial Protection Bureau. Undated guide; checked October 17, 2026.

https://files.consumerfinance.gov/f/documents/cfpb_msem_national_agents_guide.pdf

[A04] Frequently Asked Questions for Representative Payees. Social Security Administration. Undated; checked October 17, 2026.

<https://www.ssa.gov/payee/faqrep.htm>