



Living to 100SM Club Planner

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The Living to 100 Club Planner

Where can I record all of the details – accounts, contacts, policies, professionals, logins, etc. – that I will need if and when an unexpected event occurs to a loved one? Or, where can I record this information so others in my family can locate it quickly?

Here is a resource to help: [The Living to 100 Club Planner](#). We all know that a spouse, parent, or other immediate family member can experience a sudden medical condition or accident and retrieving the details to make necessary decisions can be a daunting experience.

Experiencing the decline or loss of one or both parents, or worse yet, a spouse, is difficult enough, but even more so when we are unprepared and uninformed about the myriad financial, banking, and lifestyle details that must be addressed. But, planning, prevention, and advance decision-making will help immeasurably to reduce distress at these difficult times. Alternatively, taking these planning and preparation steps yourself – as a proactive measure – will bring a measure of relief to those you entrust with this record.

The Living to 100 Planner will become your go-to resource when compiling this information and keeping it all in one place. And, importantly, you will have it at your fingertips when these details are needed, as they inevitably will be. And of course, be sure to store this Planner in a safe place, so there is peace of mind knowing that you have attended to this important issue and your energies can go to where they are most needed.

Joseph Casciani, PhD
President, Living to 100 Club
Spring, 2025

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Legal

- ☐ *Is there a durable power of attorney for healthcare?*

Date of DPOA: _____

Name of attorney: _____

Contact information: _____

Where stored: _____

- ☐ *Is there a durable power of attorney (DPoA) for the estate and financial matters?*

Date of DPOA: _____

Name of attorney: _____

Contact information: _____

Where stored: _____

- ☐ *Is there a will or estate plan, and is it current?*

Date of DPOA: _____

Name of attorney: _____

Contact information: _____

Where stored: _____

- ☐ *Does the durable power of attorney have a health care or medical directive for life support measures?*

Yes or no: _____

If no, follow up date to consult with attorney:

Action: _____

- ☐ *Are trusts set up for estate management and long term care, and are copies of the trusts stored in an accessible and safe place?*

Yes or no: _____

Action: _____

- ☐ *Location of all property deed(s):*

- ☐ *Finance and Banking*

Bank Accounts/ Co-signers: _____

Bank Accounts/ Co-signers: _____

Bank Accounts/ Co-signers: _____

- ☐ *List of all bank accounts, pension and retirement accounts, mortgage, social security accounts and distributions:*

- ☐ *List of safe deposit boxes location, contents, keys, codes, and access (and home safe if present):*

- ☐ *Insurance beneficiaries (confirm these are current):*

- ☐ *Online bank accounts to oversee automatic bill paying and automatic deposits:*

Bank: _____

Account number: _____

Bill pay or auto deposit: _____

Bank: _____

Account number: _____

Bill pay or auto deposit: _____

Bank: _____

Account number: _____

Bill pay or auto deposit: _____

Bank: _____

Account number: _____

Bill pay or auto deposit: _____

Action: _____

Insurance *(life, health, long term care, home, auto)*

Company: _____
Policy number: _____
Type of Policy: _____
Premiums: _____
Policy renewal date: _____
Does it provide adequate coverage: _____

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Home Health Care

- ☐ Are there plans to provide for post-acute care after discharge, bed-bound care, in-home caregiver assistance or home health?

Placement in Assisted Living or Skilled Nursing

- ☐ Research on the best options for ALF or SNF placement:

Research on paying for this placement:

Medical

- ☐ List of all physicians and ancillary health care providers (dentist, optometrist, specialists) and their contact information:

- ☐ Access to and location of necessary medical history and medical records:

- ☐ Current medications, prescribers, pharmacies, and refill dates:

Computer Devices

- ☐ Logins (usernames and passwords) for phones, laptops, desktops:
- ☐ TV, Internet and streaming services, email accounts, social media accounts, usernames and passwords:

- ☐ Offsite cloud servers and storage services for personal documents, photos and other data

Lifestyle Decisions

- ☐ Discussions and decisions in place on when to downsize or to make necessary home modifications to allow aging in place:
- ☐ Advance discussion of when to bring in paid and unpaid home caregivers, home health providers and decisions:
- ☐ Advance discussion of when it is necessary to give up the car keys and when to move from independent living and decisions:
- ☐ In the case of a parent's decline, discussion about the role of adult children and who will make decisions, who will manage bill paying, legal, insurance, and end of life decisions?
- ☐ Advance discussion about funeral and memorial services, burial and cremation:

Name: _____

Date: _____

Name: _____

Date: _____

Name: _____

Date: _____

Who to notify at time of death

- ☐ Veterans Administration
- ☐ Major Credit Bureaus *To be informed of all debts and to ensure that no new credit is extended in name of deceased (Equifax, Experian, Transunion)*
- ☐ Post Office *To set up mail forwarding*
- ☐ Medicare
- ☐ Other health Insurance
- ☐ Social Security
- ☐ Life Insurance Companies
- ☐ Banks and Mortgage Companies
- ☐ Department of Motor Vehicles
- ☐ Email and Website Accounts
- ☐ Organization Memberships

Other considerations

Though not included above, it may be prudent to review these items and compile the details as needed:

- ☐ Wishes for charitable donations

- ☐ Stockbroker contact and accounts

- ☐ Records management of current and past clients

- ☐ Credit cards, bank and account numbers

- ☐ Social media accounts, platform and logins

- ☐ Desktop, laptop, tablet logins

- ☐ Email accounts and logins

- ☐ Offsite records storage accounts

- ☐ Wishes for funeral, cremation and dispersal of ashes, or body/organ donation to research

NOTES TO MYSELF

[illegible]

The Living to 100 Club is the creation of geropsychologist Dr. Joe Casciani and focuses on re-thinking stereotyped views about getting older and throwing off the limitations we put onto older adults. Living to 100 is as much a mindset as it is a destination.

Club members don't slowdown in their advancing years, and successful aging means coping with whatever struggles come their way.

Our goal is to help members live longer, healthier, and happier lives, and if this is not in the cards, to stay positive while trying. The website has resources, inspiration, and products for seniors on successful aging and longevity.

He also hosts podcasts with invited guests who talk about research on Alzheimer's disease, culinary medicine, decision-making capacity, and other topics. The Living to 100 Club Radio Show helps listeners navigate around the hurdles, stay as healthy as we can in the process, and make the road ahead more enjoyable.

Website:

- <https://Livingto100.Club>

Email:

- Info@Livingto100.Club

Podcast:

- <https://livingto100.club/podcasts-page/>