

# Elder Guardianship Preparedness Checklist

## Helping You Prepare for the Florida Guardianship Process

Before petitioning for guardianship of an elderly loved one, it’s important to gather information, prepare documentation, and assess the individual’s needs. This checklist will help you get organized and feel more confident as you take next steps.

### STEP ONE

#### Observe and Document Changes

- ☐ Take notes on changes in memory, hygiene, finances, or behavior.
- ☐ Record examples of risky or unsafe behavior (e.g., wandering, missed medications).
- ☐ Speak with trusted caregivers or family members who have noticed changes.

### STEP TWO

#### Gather Key Documents

- ☐ Identification (driver’s license, passport, Social Security card).
- ☐ Financial documents (bank statements, bills, investments, property deeds).
- ☐ Medical records and diagnoses related to cognitive decline or incapacity.
- ☐ Any existing legal documents (Power of Attorney, Trust, Living Will).

### STEP THREE

#### Schedule a Medical Evaluation

- ☐ Make an appointment with a physician or neurologist to assess capacity.
- ☐ Ask for written statements or reports supporting incapacity concerns.
- ☐ Keep a copy of all medical paperwork related to the evaluation.

### STEP FOUR

#### Assess Immediate Risk or Need

- ☐ Is your loved one in physical danger or being financially exploited?
- ☐ Are bills, medications, or appointments being missed regularly?
- ☐ Is someone abusing their Power of Attorney or failing to act?

### STEP FIVE

#### Speak With an Attorney

- ☐ Schedule a consultation with a Florida guardianship attorney.
- ☐ Discuss alternatives to guardianship (e.g., updated POA or trust).
- ☐ Prepare to file a Petition to Determine Incapacity and Petition for Appointment of Guardian.