

CHECKLIST: If Principal Becomes Incapacitated

- Oversee Care of Principal**
- Find the Estate Planning Documents**
- Notify Attorney**
- Find Out What Insurance Covers**
- Have Doctors Document the Incapacity**
- Become Familiar with the Finances**
- Apply for Benefits**
- Put Together Team of Advisors**
- Notify Bank, Broker, etc.**
- Take Care of Record Keeping and Accounting**