



**Tax Prep for Aging Parents: A Simple Checklist for Adult Children:**  
What you need to access, gather, and track

**1. Social Security Access**

- SSA-1099 form (Social Security Benefit Statement)
- Login access to your parent's Social Security account
- Apply to become a Representative Payee if needed
- Have your parent's physician complete SSA-787 (capacity form)

**2. Legal & Financial Authority**

- Financial Power of Attorney (POA), if applicable, for authorization to speak with their accountant, bank, and other institutions

**3. Income Documents**

- Social Security (SSA-1099)
- Pension or retirement income (1099-R)
- Investment income (1099-INT, 1099-DIV)
- Any additional income sources

**4. Medical Expense Tracking: Medical Records & Documentation**

- Annual summary of medical expenses
- Medicare premiums (Part B, Part D, supplemental)
- Long-term care insurance
- Doctor, hospital, and dental bills
- Prescription medications bills
- Home care or aides (if medically necessary)
- Assisted living (portion may qualify if medical)
- Receipts for major out-of-pocket costs
- Insurance statements (EOBs)

**5. Organization System**

- One folder for all tax-related documents
- Ongoing list of medical expenses throughout the year
- Notes on any changes in care

## 6. Timing & Planning Ahead: File for an extension if necessary

A Final Note: Most problems during tax season aren't about the return itself—they're about not having access to the right information when you need it.

7. If your parent or one of your parents has passed, you may need to file a Request For Deceased Individual's Social Security Record, [which can be found here](#).

**We help families navigate care for aging parents.**

[Email Today.](#)

**We're here for you.**

