



COMFORT *Of* LIVING  
RETIREMENT RESIDENCE

# LEGAL & DOCUMENTATION CHECKLIST

Your Safety Net: Essential Paperwork for Senior Living



FAMILY SUPPORT MATERIAL

# INTRO



A complete and accessible set of legal, financial, and medical documents provides the necessary "safety net" that empowers family members to act as advocates, simplifies the move-in process, and ensures your loved one's wishes are honoured.<sup>1</sup> This guide provides a comprehensive checklist for organizing the critical paperwork needed before, during, and after the transition to an Ontario retirement home.

## PART 1: LEGAL PREPAREDNESS (THE CORNERSTONES)

These documents are essential for maintaining control and autonomy, especially if mental or physical capacity changes.

*Note: Keep original legal documents (Will, POAs) in a secure, fireproof location, but ensure your Attorney and the residence manager have certified copies.*



Document	Why It Is Essential for Retirement Living	Status *	Location
Continuing Power of Attorney for Property (PoA)	Allows the designated "Attorney" to manage finances (pay residence fees, sell the home, manage bank accounts) if the senior becomes incapable.	<input type="checkbox"/> Done	
Power of Attorney for Personal Care (PoA)	Allows the Attorney to make decisions about healthcare, housing (the retirement home), diet, and safety if the senior becomes incapable of doing so.	<input type="checkbox"/> Done	
Last Will and Testament	Directs the final distribution of assets. While not for day-to-day use, the executor's contact info is needed for estate planning.	<input type="checkbox"/> Done	
Advance Care Plan / Living Will	Records the senior's specific wishes regarding end-of-life medical treatment (e.g., life support, resuscitation). Crucial for the residence nurse to have.	<input type="checkbox"/> Done	
Marriage/Divorce Certificates	Needed for pension benefits, spousal tax claims, and legal estate finalization.	<input type="checkbox"/> Done	
Lease/Residency Agreement	The signed contract with the retirement home. This must be filed safely alongside other legal documents.	<input type="checkbox"/> Done	



## PART 2: MEDICAL DOSSIER (THE CARE SNAPSHOT)

This information ensures the residence staff can provide safe, personalized, and efficient care from Day.

Information	Why It Is Essential for Residence Staff	Status	Notes
Current Medication List	Must include all prescription drugs, over-the-counter medication, supplements, dosage, and frequency. Hand to the Wellness Manager on Move-In Day.	<input type="checkbox"/> Collected	
Health Card (OHIP)	Provincial health coverage details.	<input type="checkbox"/> Copy Made	
Physician Contact List	Name, phone number, and address for all specialists (GP, Cardiologist, Dentist, Optometrist, etc.).	<input type="checkbox"/> Collected	
Medical History Sheet	Key chronic conditions (e.g., Diabetes, Heart Disease), known allergies, and date of last hospital stay or fall.	<input type="checkbox"/> Collected	
Immunization Records	Up-to-date records for flu shots, COVID-19, and pneumonia vaccines.	<input type="checkbox"/> Collected	
Private Care Plan (If Applicable)	Any documentation from a previous Home and Community Care Support Services (HCCSS) care plan.	<input type="checkbox"/> Collected	

## PART 3: FINANCIAL & INSURANCE RECORDS

The transition period requires managing payments, cancelling old policies, and ensuring all benefits are flowing to the new address.



Record	Why It Is Essential for Financial Continuity	Status	Policy/ Account No.
Banking Information	Account numbers for the primary chequing and savings accounts for automatic fee withdrawal.	<input type="checkbox"/> Collected	
CPP/OAS/GIS Information	Documentation showing current benefit amounts and start dates. Needed for any potential financial aid review.	<input type="checkbox"/> Collected	
Long-Term Care/Critical Illness Insurance	Policy details, provider name, and claims process contact (if the benefit is intended to cover the retirement fees).	<input type="checkbox"/> Collected	
Life Insurance Policies	Policy details and beneficiary designations (must be up-to-date).	<input type="checkbox"/> Collected	
Recent Tax Returns (2 Years)	May be required for GAINS application or financial disclosures for subsidization programs (if applying for Long-Term Care).	<input type="checkbox"/> Collected	
Property Tax Statements	Crucial if the home is being sold or rented out.	<input type="checkbox"/> Collected	



## PART 4: MANAGING THE DIGITAL LIFE & UTILITIES

The administrative "clean-up" often involves cancelling services at the old home and establishing new ones in the suite.

Action Item	Old Address Status	New Residence Status	Notes
Canada Post Mail Forwarding	<input type="checkbox"/> Started		Ensure it starts a few days before the move.
Home Insurance (Old Residence)	<input type="checkbox"/> Cancelled		Cancel or convert to a "vacant property" policy if selling.
Utilities (Hydro, Gas, Water)	<input type="checkbox"/> Cancelled		Give 7-10 days' notice for cancellation.
New Phone/Internet/Cable		<input type="checkbox"/> Ordered/Set Up	Confirm the residence allows external providers.
Subscriptions/Memberships	<input type="checkbox"/> Cancelled		Newspapers, magazines, gym, clubs, etc.
Digital Passwords	<input type="checkbox"/> Stored Safely		Create a secure, master list of passwords (email, banking, social media) and share the location with the PoA.