



Real Estate & Dementia *Caregiver Checklist*

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Legal & Financial Preparation

- ☐ Durable power of attorney is signed and accessible
- ☐ Will and/or living trust is updated
- ☐ Property deed is reviewed for potential transfer
- ☐ Home value is appraised or estimated
- ☐ Consultation with elder law attorney completed

Housing & Property Plans

- ☐ Decision made on keeping, renting, or selling the home
- ☐ Home assessed for safety and accessibility
- ☐ Relocation or downsizing options explored
- ☐ Backup living arrangements considered

Funding Care Options

- ☐ Medicaid eligibility and implications reviewed (please note that the Medicaid program in Puerto Rico differs from Medicaid programs operating in each of the 50 states and the District of Columbia)
- ☐ Long-term care insurance checked
- ☐ Government or veteran aid researched
- ☐ Plan for proceeds from home sale created

Selling and Transitioning

- ☐ Real estate agent with experience in elder care contacted
- ☐ Home is prepared for sale or rental
- ☐ Moving and storage needs identified
- ☐ Emotional readiness discussed with family

This checklist helps bring clarity in a difficult season. Keep it handy as a guide through the many real estate-related decisions that caregiving may require.

Need help navigating these decisions in Eastern Puerto Rico? Let's talk! I'm a real estate agent and caregiver who understands your journey.

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