

Before You Need It

- **Start Here** -

Gather what you have. Understand what matters. Know who to call.

If you're facing a move for your parent, or sensing one is coming, and you don't quite know where to begin, this is the place to start. These **two documents work together**: one helps you gather what your family already has, the other helps you understand what it all means and know who to call when something's missing.

**You don't have to have it figured out yet.
You just have to begin.**

Before It's Needed — the workbook

A fillable checklist organized into five sections: Legal, Financial, Medical, People, and Conversations. Its job is to help your family gather what you have — documents, account numbers, contacts, and decisions — and surface what's missing.

Fill it in. Set it somewhere safe. Update it when things change.

What You Need to Know — the guide

A companion guide organized into the same five sections. Its job is to explain what each piece of the workbook means, why it matters under Texas law, and which professional handles what when something is missing.

Read it once cover to cover. Keep it next to the workbook.

A suggested way to work through both

Step 1. Read What You Need to Know once, beginning to end. It takes about an hour. Don't try to take action while reading — just absorb the landscape.

Step 2. Sit down with Before It's Needed — ideally with the senior, ideally without time pressure. Work through one section at a time. Some families do all five in an afternoon; others spread it across several weekends. Either approach is fine.

Step 3. As you fill in the workbook, note the gaps. Documents that don't exist. Accounts no one can access. Professionals who aren't yet on the team. Conversations that haven't happened.

Step 4. Use What You Need to Know's "When to call which professional" table (near the end) to identify who handles each gap. Make the calls. The gaps are the action items.

Step 5. Make sure at least two people in the family know where the completed workbook is kept.



A note on pace

You don't have to finish either document before the transition begins. They're not a test, and there's no grade. What matters is that the work has started — that the right documents exist, that the right people know what's where, that the conversations have been had, and that the right professionals are identified before they're urgently needed. Even partial progress on these fronts changes how a transition goes when the moment comes.

If the senior is healthy and capacity is solid, you have time. Use it well.

If a crisis is already underway, prioritize Section 1 of the workbook (Legal Documents) and Sections 1 and 4 of the guide (the Legal Foundation and the Professional Team). The rest can come later.



About this packet

Both documents are part of the Senior Move Roadmap™ system — a seven-step framework for Texas families navigating the transition into senior care. The full system, with deeper guides for each step, is available free at SeniorMoveRoadmap.com.



Is it Time?



Have the
Conversation



Make the Plan



Understand
the Costs



Choose the
Right Place



Prepare the
Home



Make the
Move

Call or text me anytime:



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