

ITEM #	DESCRIPTION	PERSON RESPONSIBLE	WHEN
HOME	MAIL		
	<ul style="list-style-type: none"> <li>Address forward/Change</li> </ul>		AS NEEDED
	<ul style="list-style-type: none"> <li>Review, pay, respond to, file documents received</li> </ul>		AS NEEDED
	<ul style="list-style-type: none"> <li>Mail documents (nominal cost of envelope, stamps...)</li> </ul>		AS NEEDED
	HOME CARE (House, Condo, Apt)		
	<ul style="list-style-type: none"> <li>Visit home, ensure repairs are done &amp; paid</li> </ul>		WEEKLY/AS NEEDED
	<ul style="list-style-type: none"> <li>Housekeeping / home cleaning</li> </ul>		WEEKLY
	<ul style="list-style-type: none"> <li>Lawncare / snow removal</li> </ul>		AS NEEDED
	<ul style="list-style-type: none"> <li>Check lights, temperature levels in summer/winter, pay utilities</li> </ul>		WEEKLY
BANKING	DEPOSITS		
	<ul style="list-style-type: none"> <li>Make deposits on behalf of family member.</li> </ul>		AS NEEDED
	PAYMENTS		
	<ul style="list-style-type: none"> <li>Ensure income tax instalments paid</li> </ul>		QUARTERLY / ANNUALLY
	<ul style="list-style-type: none"> <li>Mortgage/Rent/Condo fee</li> </ul>		WEEKLY / MONTHLY
	<ul style="list-style-type: none"> <li>Lease payments (e.g. car), review if lease is required, consider cancellation</li> </ul>		WEEKLY / MONTHLY
	<ul style="list-style-type: none"> <li>Credit card balance paid, review items purchased to ensure they are approved, cancel cards if required</li> </ul>		MONTHLY
	<ul style="list-style-type: none"> <li>Property &amp; school tax payments</li> </ul>		ANNUALLY
	REVIEW BANK STATEMENT(S) to ensure all debits/credits are accurate, positive cash balance, etc.		MONTHLY
OTHER	DOCUMENTS required for tax return preparer		ANNUALLY
	TAX RETURN (preparation, review, sign, timely submission)		ANNUALLY
	INSURANCE (life, health, dental, home - ensure payments made, renewal is done, modifications made if required)		WEEKLY / MONTHLY / ANNUALLY
	SALE (home, car, furniture, etc., if required)		ONE-TIME
	FINANCIAL INVESTMENT(S) – Review statement of account(s), review transactions, meet with advisor, etc.		QUARTERLY / ANNUALLY OR AS REQUIRED
	POWER OF ATTORNEY		IF NECESSARY OR AGREED UPON
	ESTATE PLANNING		TBD