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# Settling In: Your Guide to Updating Important Documents

Moving to senior living involves more than packing boxes—it also means making sure your mail, accounts, and paperwork follow you to your new home. Use this checklist to stay organized and avoid missed bills, delayed medications, or other surprises during your move.

## How to Use This Checklist

- Work through each section at your own pace—start a few weeks before your move if possible.
- Check off items as you complete them, or print this page to track your progress by hand.
- Enlist a family member or trusted friend to help tackle phone calls and paperwork together.

**Please Note:** *This is a general guide meant to help you get started. It may not cover every account, document, or step specific to your situation, so be sure to think through any additional changes that apply to you.*

## Forward Your Mail

- Submit a change of address with USPS (online, by mail, or in person)
- Set a mail forwarding period to cover the transition
- Notify family and friends of your new address directly

## Notify Your Healthcare Providers

- Primary care doctor and specialists
- Pharmacy (to transfer prescriptions)
- Dentist and eye doctor

**Helpful Tip:** *If your new community offers on-site healthcare, ask how they coordinate with your current providers.*

## Update Key Accounts and Institutions

- Social Security Administration
- Medicare and Medicaid
- Health insurance providers
- Banks and credit card companies
- Pension or retirement account administrators
- Investment and brokerage accounts
- Utility companies (for final bills or refunds)
- Subscriptions, memberships, and magazines

## Gather and Update Important Documents

- Government-issued ID or driver's license
- Medicare and Medicaid cards
- Social Security card
- Power of attorney and healthcare directives
- Will or estate planning documents
- Birth certificate and other vital records
- Voter registration
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