THE OVERSEAS CAREGIVER

with confidence and heart

CHECKLIST

10 ESSENTIAL STEPS FOR PEACE OF MIND

A FREE RESOURCE FROM
THE OVERSEAS CAREGIVER

Welcome

Caring for parents from afar can feel like a lot to carry. This checklist is here to make things simpler, giving you 10 essential steps that bring order, clarity, and peace of mind.

You don't need to do everything at once — just start with one step. Each small action is an act of love that truly makes a difference.

10 ESSENTIAL STEPS

- **Collect key documents** - Keep copies of IDs, passports, wills, and other legal papers together in one safe folder.

- **Create a health summary** - Write down doctors' names, medical aid details, and a current medication list for quick reference.

- **Review insurance policies** - Check that cover amounts, beneficiaries, and premiums still match your parents' needs.

- **Organise financial information** - Record details of bank accounts, pensions, and investments so nothing gets overlooked.

- **Secure property and assets** - Keep home ownership, vehicle papers, and household insurance policies up to date.

- **Plan for emergencies** - List nearby hospitals, trusted neighbours, and key contacts who can step in quickly if needed.

- **Start up digital access** - Note important email, phone, and online account details (shared only with consent).

- **Stay tax compliant** - Ensure annual tax returns are filed on time, with the help of a registered tax professional if needed.

- **Share the load** - If siblings or relatives can assist, share copies of key summaries so everyone stays informed.

- **Keep talking** - Maintain regular, gentle conversations with your parents — connection matters as much as organisation.

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READY TO FEEL EVEN MORE CONFIDENT?

You've Already Started

By using this checklist, you've taken the first step toward caring for your parents with confidence and heart. The journey doesn't have to feel overwhelming — with the right tools and guidance, it can feel lighter and more manageable.

If you're ready for more support, practical templates, and step-by-step lessons, **The Overseas Caregiver's Guide** is here to walk with you.

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The Overseas Caregiver's Guide

A practical system for South African migrants caring for parents back home

By JANET EDWARDS

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