



# Senior Living Specialists of California

CHECKLIST FOR YOUR LOVED ONE'S GOLDEN YEARS



**Everything on this list may not apply to your family, but consider each as your loved one's needs may evolve over time.**

## Aging In Place

We believe that that everyone's preference would be to age-in-place at home.

- ☐ **Health Assessment – can your loved one safely stay at home?**
  - ☐ Has your loved one had an annual physician's assessment or experienced any cognitive issues?
  - ☐ Does their doctor believe they can safely live independently?
- ☐ **Home Health, Home Care, and Hospice – has your loved one tried in-home care services?**
  - ☐ Has your loved one's doctor recommended any type of in-home care or assistance?
  - ☐ Are they able to complete Activities of Daily Living (ADLs) alone?
  - ☐ Can they manage their medications alone?
  - ☐ Do they have noticeable cognitive issues?
  - ☐ Do they have an official diagnoses for cognitive issues such as Alzheimer's, Dementia, or Parkinson?
  - ☐ Do they need 24-7 care and supervision?
- ☐ **Counseling – do you or your loved one need help coping with the aging process?**
  - ☐ Does your loved one deal with mental health issues such as Depression, Anxiety, Bipolar Disorder, etc.?
  - ☐ Are you or other caretakers helping your loved one needing help from a counselor or support group?
  - ☐ Has your loved one recently lost a spouse or long-term partner?
- ☐ **Socialization – is your loved one in need of social interaction?**
  - ☐ Does your loved one feel isolated?
  - ☐ Are they needing a structured social program such as Adult Daycare to address loneliness?

## Moving to Senior Living Communities

When your loved one can no longer live independently, there are some considerations when thinking about senior living options.

- ☐ Does your loved one need help with Activities of Daily Living (ADLs) or medication management?
- ☐ Do they have acute medical needs such as catheters, colostomy bags, trach tubes, feeding tubes, etc.?
- ☐ Do they need help getting in and out of bed or getting to the bathroom?
- ☐ Do they have an official diagnoses for cognitive issues such as Alzheimer's, Dementia, or Parkinson?
- ☐ Does your loved one need a high caregiver ratio?
- ☐ Have they had a Form 602 Doctor's Assessment completed? (Every senior living community requires this.)

## Financial Considerations

Understanding the distinction between the various types of coverages and benefits available can help when budgeting for your loved one's senior living journey.

- |   |  |
|---|--|
| <input type="checkbox"/> Do you have a full picture of your loved one's assets? <ul style="list-style-type: none"><li><input type="checkbox"/> Do they have any income streams, pensions, annuities, investment accounts, etc.?</li></ul> | <input type="checkbox"/> Is your loved one receiving Social Security benefits?               |
| <input type="checkbox"/> Do they have any 401(k)s, IRAs, or other tax deferred plans in place?  | <input type="checkbox"/> Is your loved one eligible for VA benefits?                         |
|   | <input type="checkbox"/> Does your loved one have a Long Term Care policy?                   |
|   | <input type="checkbox"/> Does your loved one have any real estate or vehicles they can sell? |
| <input type="checkbox"/> Does your loved one have Medicare or Medi-Cal?   |  |



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## Organizing & Protecting Assets

When planning for retirement, every dollar counts, so it's important to know how to preserve, organize, and protect what you have.

- ☐ Do you need to speak to an Elder Lawyer about:
  - ☐ Drafting a Living Will or Trust?
  - ☐ Conservatorships?
  - ☐ Social Security Issues?
  - ☐ Disability Claims?
  - ☐ Medicare/Medi-Cal issues?
  - ☐ Elder Abuse or Fraud Issues?
- ☐ Does your loved one have a will or trust?
- ☐ Does your loved one have their assets in order?
- ☐ Do you have the following documents together and organized?
  - ☐ Copy of Will
  - ☐ Durable Power of Attorney for Health Care (concluding Individual Health Care Instructions)
  - ☐ Medication List
  - ☐ Estate & Trust Documents
  - ☐ Banking & Account Information (Including Applicable Passwords)
  - ☐ Life Insurance Policies
  - ☐ Health Insurance
  - ☐ Medicare and Medi-Cal ID Cards & Information
  - ☐ Pre-paid Funeral Arrangement Documents, if any

## Other Considerations

- ☐ Does your loved one need help moving, organizing, or downsizing?
- ☐ Do they need Durable Medical Equipment in their home such as hospital beds, lifts, colostomy bags, etc.?
- ☐ Do you need help finding assistance from state, local, or nonprofit resources?

If you would like help putting together a comprehensive plan for your senior living journey or have any questions about the above, please don't hesitate to reach out to us. We've been where you are now, and we're for you.