

Let's Talk--The Care Years
Taking Care Of Our Parents
Planning For Ourselves

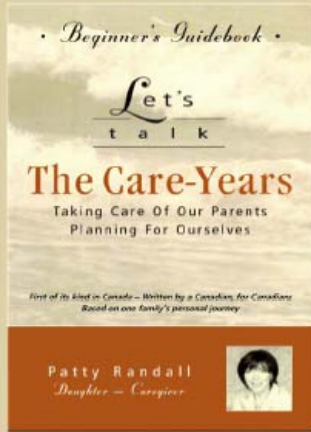
The Care-Years Planner

**WELCOME TO 'THE CARE-YEARS
PLANNER'...
I HOPE YOU FIND THE BOOKLET AND
THE RESOURCES HELPFUL**

Patty Randall

Revised by P. Randall
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This Care-Years Planner was developed by **Patty Randall**
Consultant-The Care-Years Stage Of Life
Author--"Let's Talk--The Care-Years...
Taking Care Of Our Parents/Planning For Ourselves"



For seminars, keynotes, services, resource materials
Contact Patty at
Toll free: 1-866-TALKLTC (1-866-825-5582)
or E-mail: patty@telus.net

CARE-YEARS PLANNER

Name: _____

Address: _____

Telephone: _____

Relative in case of emergency: _____ tel: _____

Friend in case of emergency: _____ tel: _____

Vital Information

Date of birth _____

Birthplace _____

Social Insurance Number _____

Medical Care Card Number _____

Spouse/Partner _____

Maiden name _____

Status of marriage(s)/relationship(s) and dates:

Key People

Notes/Reminders

NAME	TELEPHONE	CONTACT INFORMATION
Family Contact Decision-maker		
Spouse/Partner		
Children		
Family Doctor(s)		
Pharmacist --Drug Store		
Medical Specialists --Heart --Sight --Hearing --Other(s)		
Accountant(s)		

Bank Advisor(s)		
Executor/Executrix		
Lawyers		
Financial Planner... Portfolio Manager		
Insurance Advisor(s) --Personal --Property(s) --Vehicle(s)		
Trustee		
Clergy Religious Advisor		
Funeral Home Manager		
Health Care Manager(s)		
Medical Equipment Advisor		
Caregivers --Live-in --Shift --Nursing Care --Home Services		

Important Documents

Notes/Reminders

DOCUMENT	YES NO	CONTACT	TEL	ADDRESS
Will				
Living Will				
Power Of Attorney Representative Agreement				
Living Trust				
Bank Account #1 Number				
Bank Account #2 Number				
Bank Account #3 Number				
Bank Certificates				
Pension Plans				
Insurance Policies				

Medical Plans				
Income Tax Returns				
Safety Deposit Boxes				
Security Pin Codes Passwords/Log-in Ids				
Rental Property (s)				
Property Deeds/Real Estate				
Birth Certificate				
Adoption Certificate				
Marriage Certificate(s)				
Divorce/Separation Papers				
Citizenship Papers				
Funeral Home Plot/Internment Papers Entitlements				
End-of-Life Wishes (Written)				

Shareholder Agreements				
Contracts/Business Papers				
Main Assets				
Liabilities/Debts				
Memberships				
Military/Veteran Information				
Driver's License/Other				
Vehicle Information				
Credit Cards				
Financial Planning --Bonds --Mutual Funds --Stock Portfolio				

Community Information

Notes/Reminders

TYPE	TEL	SERVICES PROVIDED	COST
Local Health Programs			
Telephone Safety Reassurance/Security			
Personal Caregiver Management Companies			
Home Health Care Assistance Companies			
Companions			
Meal Programs			
Transportation			
Senior Center			
Adult Day Care Center			
Retirement Communities			

Board-Care Homes			
Assisted Living Communities			
Complex Care Nursing Homes			
Medical Nursing Care Companies			
Respite Care Centers			
Equipment Supply Stores			
In-Home Therapist Agencies			
Volunteer Agencies			
Emotional Support Groups			
Special Associations Alzheimer's Arthritis			
Caregiver Support Groups			
Hospice/Palliative Care Assistance			

Expenses

Notes/Reminders

LIVING EXPENSES	COST	MY PORTION	CO-SHARED WITH
Mortgage			
Rent			
Utilities			
House Maintenance			
Groceries			
Clothing			
Telephone			
Car payments			
Vehicle maintenance			
Laundry-dry cleaning			
Property tax			
House Insurance			
Personal Insurances			
Caregiving-regular			
Caregiving-optional			
Entertainment			
Hair			
Family matters			
Travel			
Medical Insurances			
Gifts			
Other			
TOTAL			

HOME SAFETY EXPENSES- CONSIDERATIONS	COST	AMOUNT REIMBURSED	MY PORTION
Brighter lighting			
Telephones (memory/cordless/big buttons/emergency link up/color contrast/volume) Increased 'jacks'			
Wash-wear clothing			
Guard-rails in hallways			
Night light/dimmer switch			
Grab bars-shower			
Vertical grab bars			
New shower heads			
Shower chair with transfer seat			
Raised toilet seat			
Toilet bars			
Bedroom commode			
Bedpan/bedside bottles			
Dressing aids			
Long-handled brushes			
Tap/faucet turners/chain on plugs			
Flexible shower spray hose			
Adaptable mirror			
Door knob turner			
Double handed mug/easy-grip cutlery/bottle-jar opener/reacher			
Microwave			
Enlarged/color coded tv remote			
Lightweight unbreakable dishes			
Electric appliances with auto off			
Roll-about chair with locks-kitchen			
Hospital bed			
Special mattress and covers			
Special shoes, Velcro			

Special glasses			
Hearing aid			
Emergency transmitter device			
Smoke detector			
Fire extinguisher			
Pill dispenser machine			
Garage can on wheels-outside			
Room dehumidifier			
Air conditioner (high dust areas)			
Cane			
Walker with basket, back support			
Wheelchair			
Wheelchair tray			
Wheelchair ramp			
Electric lift chair (ejectable seat)			
Security system			
New door locks			
Non—slip surfaces-walking areas			
Widen doorways			
Level floor thresholds			
Stairlift			
Elevator			
Other			
TOTAL			

MEDICAL EXPENSES	COST	MY SHARE
Doctor/specialist fees		
Medical insurances		
Prescription medications		
Ambulance transport (average)		
Medical supplies: special		
Medical supplies: regular (e.g.pads)		
Non-prescriptive vitamins		
Medical kits (pills)		
Hospital room costs		
Special diet requirements		
TOTAL		

CARE SERVICE EXPENSES	COST	MY PORTION	CO-SHARE-RECOVERY
Caregiver-skilled nursing			
Caregiver—housecleaning			
Caregiver—personal care			
Live-in caregiver			
Respite care			
Companionship			
Adult day care center			
Senior Center programs			
Bath program-hospital			
Rehabilitation programs			
Therapist program (in-home)			
Case management of care			
Transportation assistance			
Meal programs			
Chore services-handyman			
Special care—feet Other:			
Emergency response program			
Assisted living care			
Complex-nursing home care			
Special medical care			
TOTAL			

Equipment Devices

Notes/Reminders

EQUIPMENT/ASSISTIVE DEVICES	ITEMS/ REQUIREMENTS	COST
Home modifications --immediate	1. 2. 3. 4. 5.	
First-care stage	1. 2. 3. 4. 5. 6.	
Medium-care stage	1. 2. 3. 4. 5. 6.	
Daily-care stage --on-going	1. 2. 3. 4. 5. 6.	
TOTAL		

Monthly Budget

Notes/Reminders

AVERAGE MONTHLY INCOME	AMOUNT
Old Age Security	
CPP/QPP	
Guaranteed Income Supplement	
Disability Benefit Contributions	
Employee Pensions/Private pension plans	
Property rentals	
Salary/wages/commissions/profit sharing plans/royalties	
Reverse mortgages	
Savings/Investments (usually not used as monthly income)	
Other Income	
TOTAL MONTHLY INCOME	
AVERAGE LIVING EXPENSES From Living Expenses Worksheet	
AVERAGE MEDICAL EXPENSES From Medical Expenses Worksheet	
AVERAGE CARE SERVICE EXPENSES From Care Services worksheet	
AVERAGE EQUIPMENT/DEVICES EXPENSES From Equipment Expenses Worksheet	
OTHER EXPENSES	
TOTAL INCOME	
MINUS TOTAL EXPENSES	
MONTHLY BALANCE	