

CAREGIVING TOPICS

CHECKLIST ON FAMILY MATTERS

The following checklist helps to organize family matters and plan ahead.

LEGAL MATTERS Contact attorney about: Money Planning

- Durable power of attorney**, durable power of attorney for health
- Living will (FL Law 1984); health surrogate; prehospital DNR (Do Not Resuscitate)
- Trust funds, irrevocable trusts
- Legal changes due to moving to another state
- Guardianship (Plan ahead to avoid the need for guardianship.)

FAMILY BUSINESS Someone must handle:

- Regular bills:
 - Electric/gas Rent/mortgage Water/sewer
 - Telephone Car Television/cable
- Back up plans.** If something happens (hurricane, fire, etc.), what is the family backup plan? Who helps? Have you packed: important papers, medicines, clothing, water, food, etc.?
- Medicine (Dose? Location?)
- Wallet-size page sum of Health Record: allergies, major illness, surgery, medicines, etc.; I.C.E (In Case of Emergency) number on cell phone to show health summary & information
- Help with grocery shopping, bills, cooking, cleaning, laundry, house repairs, yard, travel
- Security box or safe (Location? Key or combination?)
- Real estate (Location of property and deeds? Co-owners?)
- Bank matters/accounts (Location? Keys? Co-signer?)
 - Checking, savings, money market, fund beater, IRA, CD
 - Safety deposit box
- Social security or pension (if under age 65, social security disability):
 - Check, mailed home or direct deposit
 - Change the representative payee?

INSURANCE Know policy schedule, location and agent. CHECK WAIVERS!

- | | | |
|--------------------------------|---|-----------------------------------|
| <input type="checkbox"/> House | <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Medical |
| <input type="checkbox"/> Car | <input type="checkbox"/> Veterans medical | <input type="checkbox"/> Medicare |
| <input type="checkbox"/> Theft | <input type="checkbox"/> Disability | <input type="checkbox"/> Medicaid |

SUPERVISION OF PATIENT Keep patient safe, safety-proof the home and plan ahead for crises:

- Driving a vehicle (Drivers must be safe! Plan ahead for other transportation.)
- Identity bracelet/necklace for wanderers; a recent picture of patient (Medic-Alert/Safe Return Program); patient-caregiver bracelet set available; Life Line; ICE (In Case of Emergency) medical records summary & contact information card (1-877-564-6423 toll free)
- Safety locks on doors for wanderers; fence yard

IN EVENT OF DEATH

- Summary of assets
- Autopsy for diagnosis

- Funeral arrangements
- Cemetery lot (Deed? Location?)

Doty, L. Univ. of FL Memory Disorder Clinic (352)273-5550, Bx 100236, Gainesville, FL 32610-0236. Partial funding: FL Dept. of Elder Affairs, Alzheimer's Disease Initiative. Adapted from Alzheimer's Resource Center, P. Jimison & Shellie Brassler, Orlando, FL.