

# CREATING A COMPREHENSIVE FAMILY CARE PLAN



The goal is to make sure our loved one(s) receive the best care and support needed as they age. In addition, the plan is intended to ascertain the roles of the family in that care.

- **Initial steps**

The goal of the initial Conversation, conducted by adult children with a sibling or siblings and possibly older grandchildren, is to help create a plan of action on how to start the Family Conversation. It is important to be on the same page to avoid hurt feelings/being left out, or feeling ambushed. You know your family best, so keep in mind that the people involved may be different, maybe it is a daughter and mom's sister or best friend, etc. If there are family members that have a strained relationship with the loved one(s), or if you are an only child, professional guidance may be necessitated. The most successful plans begin with the Family Conversation conducted by an alpha adult child or the one with the closet relationship to the older loved one.

- **Family Conversation with the Loved One(s) - It's All About Them!**

From working with families throughout the United States, a common theme that has worked well when first beginning to have these tough conversations, and to avoid the loved one(s) feeling ambushed, is to have an adult child place a call to the loved one and "ask for advice" from them. Many times our loved ones want to help and rarely turn down this request. From here, the questions begin. This conversation may turn into many conversations, and getting answers may be challenging, but very needed.

- **As the Conversation Grows Deeper**

It may take more than one conversation to discuss all of these topics, and the hope is that this opens the communication wave between all care partners. This plan needs to be flexible, starting with the wants and desires, and moving into the what-ifs, what-nexts. After discussing where they want to live and how to best support them in doing so, it will be important to look more into the medical needs, care, legal, and financial pieces of this puzzle as well.

- *Providing Care*
- *Legal Matters*
- *Financial Matters*

- **The Plan is a Living Document, Remember...**

This plan begins with looking at the current wants and needs, but as life happens, and potential health events arise, there needs to be an understanding that this is flexible. Prepare the family for the possibility of continuous change and update per change and/or health event(s). Continue to focus on the wants/needs of the loved one(s), and be realistic for roles of the adult children/grandchildren/others involved. This plan is the starting point, and we encourage regular communication between care partners/family.



**Initial steps (Adult Children and Older Grandchildren)**

- Who is this Care Plan for? Dad - Jim Jamison is 82 (and thinking ahead for Mom - Alice, who is 79)
- Who needs to be involved in the Initial Conversation?  
Me and my wife, Molly, and my brother, Jack (and Connie), potentially our children
- Who will be the one (or two) that start the conversation with your loved one(s)?  
Molly and I will be the ones to have the in-person conversation with dad and mom

**Family Conversation with the Loved One(s) - It's All About Them!**

- Where do they want to live as they age? They want to live at home for the remainder of their lives.
- If they want to stay at home:
  - Is the layout safe? They live in a condo, 3 bed, 2 bath. It is 10 years old and it is in great shape.
  - Does it work for care, as they age? \_\_\_\_\_
  - Are there stairs to get in/out of the home? No, they can access the main level without stairs
  - Are there different levels of flooring in the home? It is a two story and all bedrooms are upstairs
    - Thresholds from one room to the next? Kitchen/hallway - they put a rug over it
  - Do the bathrooms have wide enough access for a wheelchair? Unsure, we would need to check
  - Is there at least one bathroom, preferably on the first floor with a walk-in shower? No
  - Are there grab bars in the shower? No, not at this time
  - Is there "stuff" cluttering the home? No
  - How can the home be modified to better suit their needs now, and for the future?  
If stairs are not an issue, we can look at durable medical equipment to assist as needed
- If something were to happen to them, who do they want to care for them?  
(Think of a hip/knee replacement, a fall or injury, illness, etc)  
They plan to care for each other if/as needed

**Important Information to Keep In Mind:**

*The master bath (upstairs) has a small shower; the main floor bath has a shower/tub combo. Mom will need a knee replacement most likely in a few years - look into shower chairs with a sliding bench to help her into the shower/tub.*

*The rug may be a tripping hazard - look into lowering the threshold or finding one that has a smaller "speed bump" style.*

*Stairs may be an issue - can we setup a room downstairs with a bed if needed down the road?*

### As the Conversation Grows Deeper

- Who is their current Doctor? Dad - Dr. Maxton (555-823-5462) / Mom - Dr. Perez (555) 498-4767
- Do they have regular appointments set up? Dad - Every 6-9 months / Mom - Annual
- Diagnosis / Medical Info Dad - Diabetes & high blood pressure / Mom - bad knee
- What medications are they taking? (It may help to create a list.) Dad - see list / Mom - Vit D & Levo
- Is driving becoming a challenge? (This is usually a difficult topic to approach, in many states the local DMV, when asked, will conduct a driving test after a given age.) Mom drives most of the time
- Can a spouse/partner realistically provide care to the other? Mom is right now, but struggling

### Providing Care

- Does someone live close by? No. They live in Denver, we live in Las Vegas, Jack lives in Columbus
  - Do they have the time and ability to give care, given other commitments? (Family/work/physical ability) \_\_\_\_\_
- What happens if all family members live many miles or states away? We need to talk about bringing someone in their home to help Mom care for Dad
- Are there older grandchildren that can assist with care? Our children are 22 and 18, but still live states away. Jack's kids are 14 and 11.
- Can family members be assigned tasks online (managing finances, doctor appts, securing durable medical equipment (walker, wheelchair, oxygen, toilet riser, shower bench; etc.) \_\_\_\_\_
- Can they remain home without care? Right now Dad cannot, but Mom can.
- Do they need care within the home? Yes - Mom is struggling with taking care of Dad
- Do they need to leave the home for an Assisted Living or Memory Care Community? Not yet...

### Additional Details / Observations:

*His overall physical health seems ok. He does forget names, numbers, and dates more frequently. Mom is taking care of him, he can still manage most of his daily activities, make some food, shower etc. I can see this is extremely hard for Mom. She has a bad knee and has slowed down herself. She worries about Dad. With Jack and I living far away, we need to figure out care, going forward. We are concerned about Mom's health as well.*

*Matt and I need to meet with Mom and Dad, in person. We need to discuss care moving forward and Dad's memory issues. We need to talk about bringing someone in their home to help Mom, if Dad's memory gets worse. We also need to discuss the possibility of moving Dad to a Memory Care facility. We need to talk with Mom about her health, and the toll of caring for Dad. We may need to get a Power of Attorney. There is a lot to talk about!*

**Legal Matters**

- Has the loved one prepared an Estate Plan (Trust, Will, Health Directive etc.)? Is the Plan up to date?  
*Mom and Dad have an updated Estate Plan. We do not have Power of Attorney.*
- Do they want to control where their "stuff" goes, or have the state decide?  
*They want control.*
- Do they want to control who makes health care decisions for them?  
*Yes, we do not have POA right now but will work on this*

**Financial Matters**

- Do they understand the cost of care? Yes Have they saved for those costs? Yes
- Where are their investments? They have about \$750,000 in investments, Condo is worth \$700k
- Do they have a Financial Advisor? No If so, who? \_\_\_\_\_
- Do they have safe deposit boxes? Yes If so, where are they (and keys) located?  
We will need to find out the locations of the keys
- Can family contribute to the cost of care? No
- Do they literally have money in the walls? No

**Additional Details:**

*Dad did well in his career. They have about \$750,000 in investments, the Condo is worth about \$700,000. There is no mortgage and they get about \$2,500 a month from Social Security.*

*We know they want to live at home, and that will be our goal, but they do have some funds to help private pay for community living, if needed down the line.*

**Next Steps**

- Continue to engage in discussions and keep track of other questions and/or action items.
- Plan to review this document every 6months or if a health event/concerns arise. (At least annually.)