

# CARING FOR AGING LOVED ONES MADE EASIER

A guide for ensuring you and your aging loved one  
enjoy the best life possible





## INTRODUCTION

Caring for an aging loved one can be challenging. There are a multitude of things to deal with as we're forced to take on more and more aspects of their life. Often, the person we're trying to care for is reluctant to receive help or make changes to their life, making things even more difficult.

Each of us only want the best for our loved one. Our experience has shown that the biggest single contributor to an aging senior's future wellbeing is planning. Families that take the time to plan ahead find that their loved ones have more options and better circumstances as they age. Conversely, families that do not plan find that their options are limited and are often unsatisfied with results when they are forced to make changes regarding their loved one's life.

One of the best ways to tackle this challenge is to develop a care plan that is respectful of your loved one's autonomy while meeting their clinical and personal needs. This guide is designed to help you through the process of developing just such a plan. We hope you'll find it useful. Of course, we're happy to help at any stage—just reach out using the contact info at the back of this guide.





## CARE PLAN PROCESS OVERVIEW

We recommend the following five-step process for developing a care plan for your loved one. It is simple and thorough, resulting in a plan that makes caregiving easier to manage and your loved one's life better.

**Step 1: Identify Stakeholders**

**Step 2: Set Expectations**

**Step 3: Audit & Assign**

**Step 4: Make A Plan**

**Step 5: Implement**



## Step 1:

# IDENTIFY STAKEHOLDERS

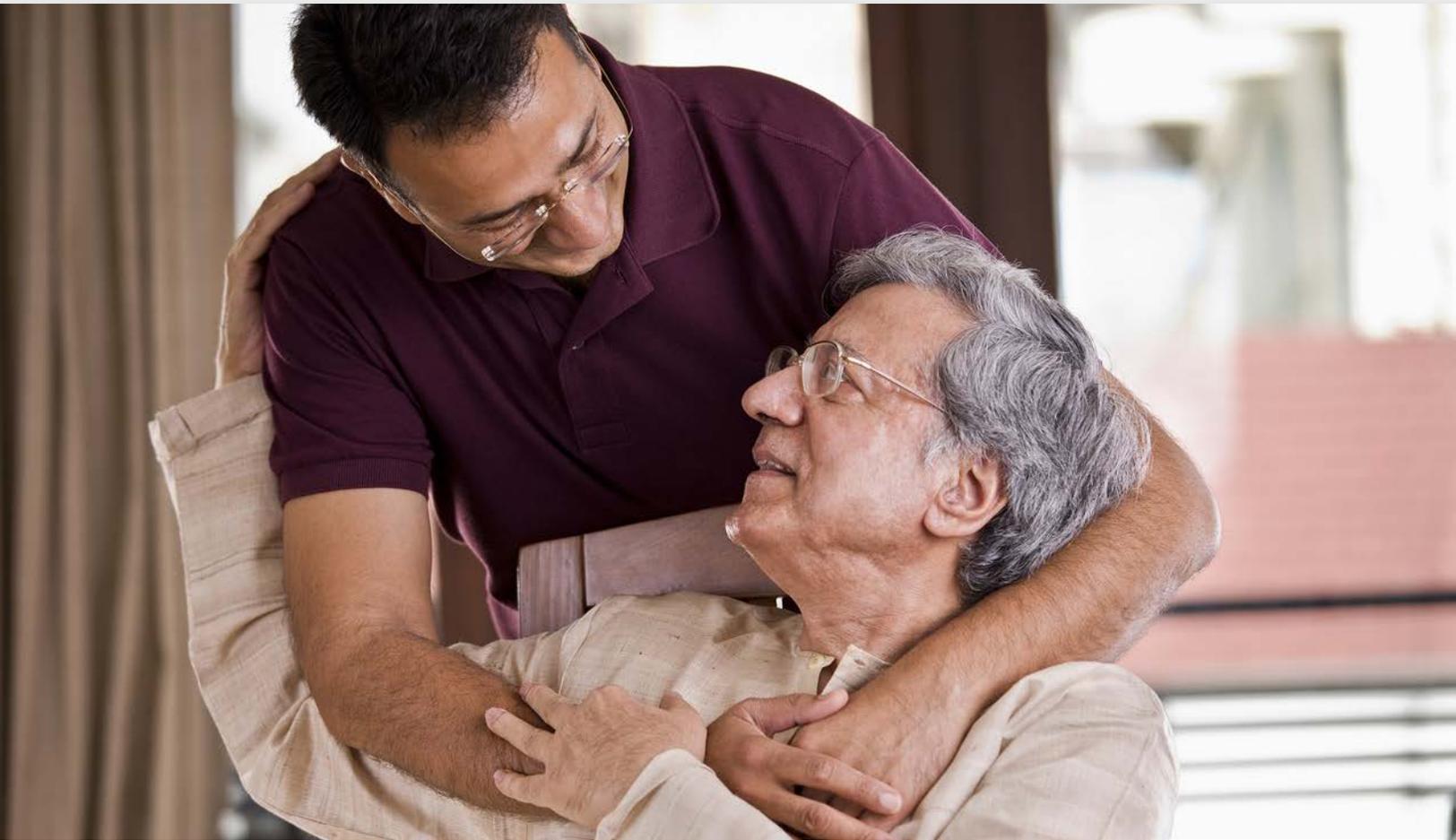
Dealing with the reality of ageing is hard. So hard that many caregivers and seniors attempt to figure out what to do on their own, rather than involve the very people that these decisions affect. Arrangements are made for clinical care, new housing is chosen, and transportation is taken over without taking the time to first consult with the loved ones they are trying to serve.



We can't overstate how important it is to include everyone who has a stake in the wellbeing of your aging loved one in this process, especially the person you're trying to care for.

We recommend making a list of the people that should be involved in the process. This includes your aging loved one and family members. Involving the right people at the start, including challenging family members, will make the long-term process much easier. Resist the temptation to try to figure out the plan on your own or to leave people out of it that tend to be difficult, as it's easier to solve the challenges facing your loved one if everyone has contributed.





## Step 2: SET EXPECTATIONS

Once you have your team assembled, spend some time talking with your loved one about expectations. What is it that they want from their life? What are their goals and objectives? What's most important to them and what isn't so critical? Do they have short- and long-term plans?

Aging family members can sometimes be treated like children, especially as their care needs increase. The fact is they have lived full and varied lives, rich in experiences. They still hold dreams and have desires, and just like younger people, still want to get the most out of life. Giving them the chance to express their goals helps set the tone for the plan. Having had this discussion, the team can now focus on how to best help their aging loved one realize their goals.



Of course, not all goals and objectives will be attainable, but starting with your loved one's goals helps to frame the planning process and its related conversations around how the family can help. There is often some negotiation that takes place between everyone involved but the team will come to a happy understanding of what's best when it starts with the wishes of their loved one.

### Step 3:

## AUDIT & ASSIGN

The next step is to conduct an audit of all the critical aspects of your loved one's life. The purpose of this is to make sure the key areas of their life are accounted for and that a point person from your team is assigned to oversee each key area. The audit includes things like personal information, financial information, property maintenance needs, health care needs, and transportation information and needs.



The audit process is quite detailed and we've provided a number of check lists in this guide to help you capture everything efficiently and keep it all organized for future reference.

This process can be conducted by one person from the team or it can be split up amongst multiple people. The team should reconvene from time to time to update and monitor progress. Make sure to take advantage of digital tools, like video meeting software, to streamline your process and make it easier for everyone to participate.





## Step 4: MAKE A PLAN

Once you've conducted the audit and have all the relevant information, it's time to make a plan.

A good way to develop a plan is to first conduct a gap analysis. To do this, simply revisit expectations and compare those expectations to what you learned in the audit process. Doing so will help you to identify any gaps that need to be addressed.

For instance, if your loved one set the expectation that they want to retire to a beach house, but they have a great deal of debt and not much in the way of cash or net worth, then there's an insurmountable gap. This would help the conversation with your loved one about what's realistic and the process of finding a happy resolution can begin.

Another example would be discovering that your loved one doesn't have a living will, alerting the team to make resolving that a priority.

The key is to develop a plan based on both the expectations established at the beginning of the process and the realities of your loved one's situation as revealed by the audit process.

Another thing to keep in mind when developing your plan is to keep it simple. Simple plans are always more successful than complicated plans. Don't be afraid to make a short-term plan that gets updated every six months or so. It's better to get a series of short-term wins than to try to solve everything in one big effort. Circumstances can change unexpectedly due to illness and the natural effects of aging, so it's better to deal with present challenges in your plan and then periodically update and modify it as needs change.



## Step 5: IMPLEMENT



A plan is only as good as its implementation. This is why we recommend keeping your plan simple and focused on the short term. Of course, there's nothing wrong with having a long-term perspective, but those kinds of plans are harder to put into action.

Again, focus on shorter periods of time, like three- or six-month segments, and list out the objectives for that period, the tasks that need to take place for each objective, and assign tasks to appropriate team members.

It helps to have one person who facilitates the implementation process. This person can act as the hub for coordination, follow up, questions, and problem solving.

Lastly, make sure that you communicate how things are going with your loved one throughout the process. This will build and protect their trust as the team works to ensure your loved one enjoys the best life possible.

### EXAMPLE PLAN

Caregiving Plan				
GAP/NEED	OBJECTIVE	TASKS	LEAD PERSON	DUE DATE
Reduce property maintenance burden	Hire lawn care service	<ol style="list-style-type: none"> <li>1. Research options</li> <li>2. Get quotes</li> <li>3. Check references</li> <li>4. Award contract</li> </ol>	Susan	End of March
Living Will	Get living will drafted and signed	<ol style="list-style-type: none"> <li>1. Contact attorney</li> <li>2. Get draft</li> <li>3. Review with Mom</li> <li>4. Get signature</li> <li>5. File</li> </ol>	Henry	April

## A WORD ABOUT ADDITIONAL NEEDS

You may find as you create a care plan for your loved one that they need more support than your team is able to provide. If so, we encourage you to explore professional in-home care or senior-living options. Please do not hesitate to contact us. We have helped thousands of families just like yours understand and navigate their options and it would be our pleasure to help you, too. Call 315-462-3140 or email [retire@ashtonplaceny.com](mailto:retire@ashtonplaceny.com) to connect with our senior care experts.

# AUDIT DOCUMENTS

## GENERAL NEEDS

NEEDS	TASKS	POINT PERSON
<b>Household</b>	Pay rent/mortgage	
	Repairs/maintenance	
	Safety	
	Groceries	
	Meal prep	
	Lawn care	
	Housekeeping	
	Pets	
	Other	
<b>Finances</b>	Bill paying	
	Banking	
	Investments	
	Financial records	
	Public and private benefits	
<b>Transportation</b>	Auto maintenance	
	Driving assessments/decisions	
	Ride coordination	
<b>Personal</b>	Management and coordination of care providers	
	Grooming and bathing	
<b>Medical</b>	Schedule health care appointments	
	Accompany key medical appointments	
	Manage medical insurance and process claims and submissions	
	Discuss and explain medical decisions	
	Manage adaptive devices	
<b>Communications</b>	Communicating key information to family members/team	

CONTACT INFORMATION
<b>NAME</b>
MOBILE NUMBER
WORK NUMBER
EMAIL
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# HOUSEHOLD

✓ DONE	DOCUMENT	NOTES	DOCUMENT LOCATION
	Mortgage or Rental Agreement		
	Mortgage or Rental Bills		
	Utility Bills		
	Telephone Bills		
	Homeowners Insurance Policy		
	Personal Property Policy		
	Property Tax Documents		
	Rubbish Removal Service		

# HEALTH CARE

<b>NAME:</b>		<b>SOCIAL SECURITY #:</b>	
<b>FAMILY CONTACT</b>		PHONE NUMBER	
EMAIL			
<b>SECONDARY CONTACT</b>		PHONE NUMBER	
EMAIL			
<b>PRIMARY CARE PHYSICIAN</b>		PHONE NUMBER	
ADDRESS			
<b>DOCTOR/CLINICIAN</b>		PHONE NUMBER	
ADDRESS			
<b>PHARMACY</b>		PHONE NUMBER	
ADDRESS			

✓ DONE	HEALTH CARE INFORMATION	NOTES	DOCUMENT LOCATION
	Living Will and Advance Directive		
	Health Care Power of Attorney		
	Medicare Number & ID Card		
	Medicaid Number & ID Card		
	Medicare Prescription Drug Coverage		
	Health Insurance Policy & ID Number		
	Veterans Administration ID Number		
	Do Not Resuscitate Order		

✓ DONE	PRESCRIPTION MEDICINE	DOSAGE	COST

# TRANSPORTATION

✓ DONE	ITEM/NOTES	ITEM LOCATION
	Automobiles: Year / Make / Model / VIN # / Registration	
	Automobile Loan Documents:	
	Bank information	
	Loan account numbers	
	Automobile Titles	
	Automobile Insurance:	
	Insurance provider information	
	Policy documents	
	Policy account numbers	

# FINANCIAL & LEGAL

✓ DONE	ITEM	NOTES	ITEM LOCATION
	Bank Records		
	Checkbooks		
	Credit Cards		
	Will		
	Durable Power of Attorney		
	Rental Agreements		
	Contracts		
	Personal Financial Statement		
	List of assets and liabilities/debts		
	List of regular household bills		
	Federal and State Tax Returns		
	Personal Loans		
	Accountant Information		
	Attorney Information		
	Insurance Agent Information		
	Financial Planner Information		
	Miscellaneous		



ASHTON PLACE  
— SENIOR LIVING —

**Website:** <https://ashtonplaceny.com/>

**Address:** 190 Ashton Court, Clifton Springs, NY 14432

**Main Number:** 315-462-3140

**Email:** [retire@ashtonplaceny.com](mailto:retire@ashtonplaceny.com)