

Information for *Life*TM

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What We Will Cover Today -

- Who we are, what we do, and why we do it
- Basic organizational tips
- Guidelines and instructions for completing the sections of the *Information For Life Kit*
- Additional resources



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Who we are and what we do...

- Match seniors who need help with active seniors who want to help.
- Senior Providers relate to the life experiences of those they care for.
- Our Senior caregivers provide a variety of services:
 - Companionship
 - Respite care
 - Transportation services
 - Homemaking services (meal preparation & light housekeeping)
 - Assistance with bathing, dressing and mobility
 - Medication reminders
 - and more.....



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And why we do it.....

The inspiration for our family owned and operated company..... *Jack*



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Information for Life Kit

- Helps you to get all your affairs and important information in order
- Provide the tools to organize a comprehensive compilation of personal, legal, medical and financial information
- The *Information for Life Kit* was developed by the Society of Certified Senior Advisors



Why it's important.....

- One life changing event - stroke, accident, onset of dementia - can expose how unaware your loved ones are of information pertinent to your care and resources
- Being unaware generates endless rounds of questions and searching and increases stress in an already stressful time
- When your loved ones most need vital information you may be least able to give it
- Planning ahead helps ensure your wishes are followed and your loved ones have the answers



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Getting Organized.....

How would you rate yourself?

- Very organized
- Organized
- Somewhat organized
- Unorganized



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How organized are seniors in general?



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A record number of senior Americans have living wills that explain their wishes for end-of-life medical care and/or appoint a surrogate medical decision maker

What percentage of seniors have living wills - also called advance directives?

72 %



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People don't like to think about what will happen if they become too ill or infirm to manage their own affairs



Experts say that partly explains why sales of long-term-care insurance policies are so anemic

What percentage of seniors have long-term care insurance coverage?

10%



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What percent of seniors regularly review their healthcare needs.

58%

What percentage of seniors will require some extra care or assistance?

86%



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Strategies for Getting Organized

- **Everything in its place**
 - ✓ Designate a place for everything - label if necessary
 - ✓ Put things back where they belong when you're done using them
- **Start small**
 - ✓ Don't try to conquer all of it at once - choose a small chunk (maybe the top of your desk) and organize that
 - ✓ Use a simple system to keep it organized, practice that system until it becomes habit
 - ✓ Expand "zone of organization" further, to a new area
 - ✓ One chunk at a time, you can get organized!
- **Create routines**
 - ✓ One of the best ways to keep organized is to make routines for everything – for errands, finances, etc.
- **Clean as you go**
 - ✓ This is a great habit ... instead of having big cleaning binges, clean things as you go

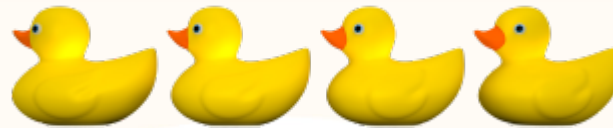


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- **All info in one place**
 - ✓ Use a notebook, binder, or some other type of system to keep all the information you regularly use and need in one place - do this and you'll never look for it again
 - ✓ The **Information For Life Kit** is an excellent tool for this!
- **Put it away now**
 - ✓ Instead of letting things pile up, put them away immediately - right now, no exceptions!
- **Use an inbox, and empty it**
 - ✓ Instead of having papers all over the place, have one inbox for all incoming papers
 - ✓ Empty it regularly (at whatever regular intervals work for you – daily, weekly, every other day, etc.)
- **Make your system usable**
 - ✓ Having problems? Don't make the system too complicated - KISS
 - ✓ If it's too difficult, you won't use it

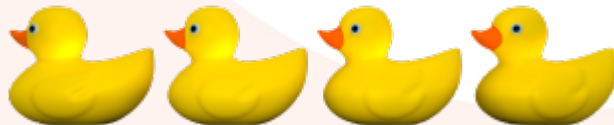


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Get and keep your ducks in a row!

- **Collect** - locate all vital records and documents
- **Correct** - check for accuracy
- **Replace** - if incorrect or missing
- **Communicate** - you **MUST** tell someone
- **Store** - access and safety



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Information for Emergency Contact - Page 2

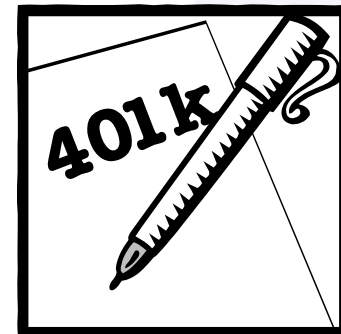
- Complete as much information as you - this will assist your Emergency Contact in finding important information in the event that you become seriously ill or injured
- Give this form to your Emergency Contact(s)
- Review instructions for Emergency Contact (s)



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Financial Accounts - Page3

- Who is your CPA/Financial Planner?
- List bank accounts, safe deposit box, loans, credit cards
- Provide information on your financial accounts for each category that applies to you
- Ensure that the individual(s) who hold your **Power of Attorney** have copies of this form
- File your **original documents** separate from copies and with this form

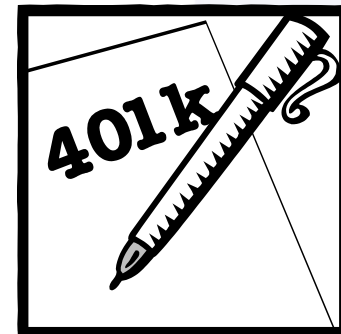


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Assets and Liabilities -

Page 4-5

- Properties you own/rent, auto info, collections and their value (sentimental and financial)
- Provide information on your financial accounts for each category that applies to you
- Ensure that the individual(s) who holds your **Power of Attorney** has copies of this form
- File your **original documents** separate from copies and with the forms



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Financial Investments - Page 6

- Stocks, bonds, mutual funds, annuities, CD's, savings bonds, etc.
- If you have a financial advisor they will be able to help
- Provide information that applies for each category of investments
- Collect only the information that applies to you
- Provide copies to the individuals who are part of your Advance Directive plan



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Business Assets/Retirement Benefits - Pages 7-8

- Key business information, especially important for small family businesses - Domain name and host/website/blogs, trade names, patents, copyright info, trademarks, licenses
- Retirement information 401K, IRA's, stock options, pensions, VA benefits
- Provide information about your legal documents for each category
- Make copies of the original documents (including the front and back of cards) and keep them separate from the originals



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Medical Advance Directives - Hope is not a plan!

- When the plan is not clear - default is to treat aggressively
- Family may be left with uncertainty, stress, guilt and financial concerns - no plan can encourage family fighting
- An Advance Healthcare Directive provides either or both of the following:
 - A decision maker - Durable Power of Attorney for Healthcare
 - State instructions for future healthcare decisions
- No single form in California - forms are available from:
 - Hospital/SNF social services or chaplains
 - Coalition for Compassionate Care of CA - www.coalitionccc.org
 - Caring Connections - www.caringinfo.org
 - Five Wishes - www.agingwithdignity.org
- Physician Orders for Life Sustaining Treatment - POLST - For seriously ill or frail at any age
 - Can be signed by Decision Maker



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Who Should You Choose As Your Agent?

- *Someone familiar with your values*
- *Willing and able to make decisions*
- *Can be close friend - not necessary to be a family member*
- *Once selected tell close friends and family who you have selected*
- *Select an alternate*



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Medical Advance Directives - Pages 9-11

- List your Power of Attorneys and where original documents are stored
- List other health care directives
 - DNR (included in POLST),
 - Organ Donor
- List contacts who can be helpful with advanced directives, e.g. attorney/physician
- Good reference information about advanced directives - page 9, 11



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Important Legal Documents - Pages 12-13

- **Personal identification** -if not with kit - where are they kept?
 - birth certificate,
 - social security card
 - marriage certificate
 - Passport
 - Military ID
- **Will and Trust documents**
- **Contracts/agreements** -
 - Family related - divorce/alimony/adoption, prenuptial
 - Rental agreements, home care
 - Other consumer contracts - cell phone, auto title, etc.



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Insurance Documents - Pages 14 - 16

- **Health Insurance**
 - Medicare and Medicare Supplement
 - Social Security Disability
 - Veterans Coverage
 - Private Insurance
- **Home and Property**
- **Business Policies**



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Information for Caregiver - Pages 17-22

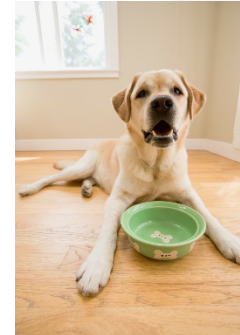
- Collect only the information that applies to the person for whom care is given
- Safety checklists - home and medication
- Information about your daily routines
- Lifestyle routines - your favorite activities, people, places
- Keep the list of commonly used caregiver resources accessible - page 21
- Caregiver's Bill of Rights - Page 22



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Home, Family Friends and Community - Pages 23-28

- Use the list and the accompanying form as guides for collecting information about:
 - How your home functions
 - Family and friends contact information
 - Pet care
 - Dependents
 - Religious information
 - Community involvement
- Include the information that would be important to know in the event you become ill or injured



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Basic Health and Medical Information - Pages 29-35

- Who are your doctors and specialists?
- What current medical/psychiatric problems do you have?
- History of surgeries, trauma, hospitalizations
- Family medical history
- Current medications and supplements
- Allergies/immunizations
- Physical aides and suppliers of DME
- Not meant to replace full medical records
- Important to review annually or when significant change occurs



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End of Life Section

Pages 36- 40

- Provides information for loved ones dealing with the details of death and the estate of the deceased
- Each estate is different and professional advice may be necessary to determine the proper course of action
- Provide basic historical information that loved ones would need to know as they plan your end-of-life services
- Makes your wishes known and guides loved ones in making final decisions



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How do you eat an elephant?

One bite at a time!



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Additional Resources :

National Institute on Aging
Information Center

P.O. Box 8057

Gaithersburg, MD 20898-8057

1-800-222-2225 (toll-free)

1-800-222-4225 (TTY/toll-free)

www.nia.nih.gov/health/publication/getting-your-affairs-order



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Questions?



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Come Visit With Us

We are available to speak to anyone interested in employment opportunities or if you or a loved one is in need of services.



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800-481-2488

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