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# Caring for the AGING Webinar Series

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“What EVERYONE should  
have in their Care Plan”

**CHECK LIST**

 **Right  
at  
Home**<sup>®</sup>  
In Home Care & Assistance

# Meet our Speakers



**Lyndsey Franceschi**

*Right at Home*

Lyndsey is the Director of Client Relations for Right at Home Sacramento-Davis where they provide in-home care and assistance services to seniors and disabled adults. Since starting with Right at Home in 2011, Lyndsey has become an advocate for her clients insuring they are receiving the quality care they need, and has become extremely knowledgeable about the home care industry.



916-779.0601

information@rah-wsac.com

rightathome.net/sacramento-davis



**Jaynie Guarnieri Dame**

*askjaynie.com*

Jaynie has a 20 plus year background as a Geriatric Care Manager and has helped countless seniors and their families. As an advocate for the rights of all seniors, she has fought for Medicare rights, and prevented premature discharges from hospitals, getting her clients the care they need by empowering families to get the medical care they deserve. As an Administrator through the state, she knows guidelines for placements and care options.



916-698-6182

info@askjaynie.com

askjaynie.com



**William L. Walker**

*William L. Walker Law*

William L. Walker from William L. Walker Law has become known in the Sacramento area and throughout California as an expert in the areas of Estate Planning, Trust Administration, Probate, Business Planning, and Elder Law.



William L. Walker  
Attorney at Law, Inc.

916-535-7526

bill@williamlwalkerlaw.com

williamlwalkerlaw.com



# Care Plan Check List

## **All medical information, i.e.**

Medicare Care Card

Supplemental insurance cards, Kaiser, any HMO's PPP's and Medicare D card for pharmaceutical.

Medication list, all including all over the counter medications

List of doctors, including specialist i.e. cardiologist, neurologists etc.

And driver's license or legal ID cards, with picture on it.

Be sure to copy both sides of each document

## **HIPAA Release**

A HIPAA release form is a very important form and should be held in connection to a health care proxy, or durable power of attorney for healthcare. This will allow you to speak with all medical professionals about your loved one's medical condition and treatment plan.

## **Health Care Proxy/ Durable power of Attorney for Healthcare matters**

This could be a document which you can get easily through your doctor's office, geriatric care manager, on line or it could be part of a trust. It is needed to make decisions when an emergency arises and should be with a HIPAA release to make things easier. It is not necessary to have a HIPAA, but it most certainly makes things much easier.

## **Financial Power of Attorney**

A financial Power of Attorney gives you access to your loved one's financial matters. It should be easily accessible in the event of an emergency. Should your loved one need to go on care in a hospital setting, skilled nursing or have to vacate their home for ongoing long-term care, you will want to have the ability to pay bills and allocate funds for future care.

Things to collect to put with your file, and DPA for finances are, all banking accounts, i.e. checking, savings, cd's bonds, stocks... all liquid accounts. You should also have access to all credit cards and balances as well as the mortgage on the home if there is a home involved.

## **A Trust**

A trust is a critical document, one which anyone with assets of over \$150k should have. This document usually has a durable power of attorney for healthcare and finances, as well as a HIPAA release. But it does much more. It will also include instructions about what the person wants to be done in the event of an emergency and or upon death. It also names the person or persons to oversee the trust. In some cases, there is also a Will along with the trust. With a Trust, probate does not have to be involved.

# Care Plan Check List Continued

## **A Will**

A will is a document that tells the world what you want to do with your possessions and assets after you die. It can be done without a Trust, but it is not really recommended for someone with more than assets of over \$150k. If you only have a Will and you have a home to sell or assets Probate may have to be involved.

## **POLST form, 'Physicians Orders for Life Sustaining Treatment'.**

The POLST form tells the Doctors or Emergency Medical Personnel what you want done at the end of life. Recently a lot of hospitals have encouraged patients to complete them upon discharge. While they do inform the professionals what you want and if you don't have a healthcare proxy, they will substitute for one, it is not a good idea to have only a POLST unless you are on Hospice or have a disease process where you are not going to recover. You should talk to your doctor and attorney about which document is right for you.

## **Final Arrangement information**

Most people do not think about this or they just don't want to talk about it. But, you need to have this conversation. You want to have any policy information if your loved one has a prepaid plan. Talk about whether your loved one wants a funeral service, or no service. Which funeral home they want involved. Some people want to be cremated. Have this conversation as well and then investigate possibly getting this prepaid as well. If you have a Trust, this information is usually in the Trust so look there when an emergency arises.

## **Copies of Trust Documents, i.e. the DPOA for both Healthcare and Finances and any final arrangement documents.**

## **Things that you may need for additional funding, like VA benefits.**

DD214, discharge documents from the military so that the VA knows that the senior did serve.

Marriage certificate for the spouse of a veteran to qualify for benefits.

Death Certificate for the Vet, so that the spouse can verify the Vet has passed and is able to sign for benefits when applicable.



# Thank you!

We appreciate your tuning into this special program. If you have any questions or need any further assistance from the speakers, please feel free to reach out to them directly.

## Enjoy your Special Offers!



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