

AGING *Well*

Critical Conversations Checklist

1. Have a conversation early with your loved one.

- How do you want to age? (At home, with relatives, in a community?)
- Who do you want involved in your care? (Family members, practitioners?)

2. Gather legal documents including their will, power of attorney, and advance directives.

- Do you have a will, power of attorney, and advanced directives?
 - a. A **will** is a legal document that describes how you would like your property and other assets to be distributed after your death.
 - b. A **power of attorney (POA)** is a legal document that gives someone the authority to act on your behalf in financial, business, or legal matters.
 - c. An **advanced directive** is a legal document that states your wishes for medical care if you are unable to communicate. In New York State there are three types: healthcare proxy form, living will, and do not resuscitate order (DNR).
- Where are these documents located?

3. Review financial information including home ownership, outstanding debts, savings and retirement funds.

- How much debt do you have, and how much have you saved?
- Where do you keep your account information including usernames, and passwords?
- Do you have a financial advisor? (If yes, ask for an introduction.)

4. Discuss insurance plans and Medicaid to establish long-term care expectations.

- Do you have a life insurance policy or long-term care insurance?
- Do you understand how Medicaid can help?
Medicaid resources for your reference: <https://www.medicaid.gov/>

5. Check in regarding their mental health.

- How are you feeling?
- Would you like to live in a community near friends and family?
- How can I help you stay connected to others?

For more information, listen to our Aging Well podcasts on Apple, Spotify and YouTube.

lorettocony.org

