

Crisis-Ready Prep Sheet:

Eldercare Planning Essentials

This prep sheet is designed to be completed before a health or care crisis arises. By gathering these essential details in advance with your Financial Advisor and Eldercare Planner, you'll create clear direction and peace of mind for decision-making.

Key Contacts

Primary Care Physician: _____

Lawyer: _____

Financial Advisor: _____

Eldercare Planner: _____

Emergency Contact: _____

Legal & Decision-Making

Advance Care Directives: ☐ YES ☐ NO

POA - Health: _____

POA - Finance: _____

Location of Documents: _____

Care Preferences

If care is required at home, preferred supports:

If staying at home is no longer possible, the preferred housing option:

☐ Retirement Residence ☐ Long-Term Care ☐ Other: _____

Key care priorities (e.g., location, language, lifestyle):

Financial Considerations

Estimated monthly budget for care: \$ _____

Insurance policies available for care coverage:

Government benefits/tax credits currently used:

Additional savings/resources allocated:

Notes and Wishes

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