



## Getting Your Affairs in Order

May 2023

### Senior Management Services

It is never too early to begin discussions with the loved ones in our lives about their future planning as well as our own. Most older adults want to age in place at home but planning ahead can be difficult as we cannot always anticipate the care needs our loved ones may have in the future (NIH). The discussion is often difficult to begin but can prove invaluable for understanding our loved one's desires for the future.

You may need some simple tools to begin these conversations, but once you've begun, you will be thankful you have had these open conversations. Many clients will ask us how to begin these difficult conversations. We recommend scheduling a time that is separate from other family events, and that intentionally includes all that are a part of the family unit and future decision making. Often families will request support from a mediator who will facilitate the discussion and make sure everyone's voice is heard. You may also look for a natural opening like a new diagnosis or the death of a neighbor or friend of your loved one. These can open the door to discussing what your loved one's wishes are when their time comes.

These are the documents and plans we recommend you have in place for yourself, but specifically for your older loved ones.

- Last Will and Testament
  - Up to Date Will
  - Power of Attorney
  - Health Care Advanced Directive: includes a Living Will and a Health Care Agent
- Financial Inventory
- Funeral Plans

An elder law attorney and/or Senior Management Services can assist you in planning.

**For additional information about Eldercare, please contact Quest EAP at 1-800-364-6352.**