

Question 3: "What experts should be consulted?" Checklist

What experts / resources do we need to bring in? _____

Check the categories that you think you might need. Use the space afterwards for contact info:
Environmental

- _____ Organizer _____
- _____ Handyman _____
- _____ Remodeler / Contractor _____
- _____ Lender, Reverse Mortgage vs. Home Equity? _____
- _____ Real Estate Agent _____

State of Mind / Mental Abilities

- _____ Medical _____
- _____ Psychologist _____
- _____ Accountant / Financial Planner _____
- _____ Legal _____

Physical Abilities / Mental Abilities

- _____ Medical _____
- _____ Physical Therapy _____
- _____ Geriatric Case Managers _____

Local (City / County)

- _____ Social Service _____
- _____ Other _____
- _____ Other _____
- _____ Other _____

State

- _____ Area Agency on Aging _____
- _____ Medicaid _____
- _____ Other _____
- _____ Other _____

National / Federal

- _____ Social Security _____
- _____ Medicare _____
- _____ Veterans Administration _____
- _____ AARP _____