

Question 4: “Are you looking short-term or long-term?” Checklist

Short-term: What changes, services or support can help maintain the “status quo” for as long as possible? _____

Family Contributions: Time Money Other _____

At-home Care: Medical Housekeeping Yard Handyman Other _____

Community Services: Meals on Wheels Check-in calls Other _____

Environment: Remodeling Other _____

Interim:

Do you need to think about an “interim” solution for a transition? Yes No Maybe
Option(s)? Current home Other home Independent Living Asst’d Living Skilled Nursing

Long-term: What type of care do you anticipate will be needed down the road? Think:

Environmental: Location in relation to family, friends, medical services, shopping

State of Mind: Reaction to change, sense of loss, activity level

Physical: Activity level, energy level, mobility

Have each decision maker review the list below and decide which will be the top three priorities for your family member. Put an “X” next to the choices, then evaluate how to balance the selections. Aim for a decision that thinks “big picture” and “small:”

Close to family / friends	Medical services / health care	Finances / Cost of living
Religious activities	At-home care	Safety / Crime
Cultural activities	Quality of life	Access to hobbies
Community services	Recreational activities	Climate
Transportation	Retail services / shopping	Landscape
Work options	Volunteer options	

How do the top choices effect the senior’s financial status?