

Legal and Financial Planning

<p>Identify the Problem</p>	<p>PROBLEM: Legal and Financial Planning (paying the bills, power of attorney, etc.)</p> <p>GOAL/EXPECTED OUTCOME: To facilitate legal and financial planning</p>
<p>Educate Yourself</p>	<p>ASSESS FURTHER:</p> <ul style="list-style-type: none"> • Does the person have capacity to make legal and financial decisions? If so, engage the person as much as possible to plan ahead • Does the person have a Durable Power of Attorney for Finances? • Does the person have a Durable Power of Attorney for Healthcare? • Does the person have a conservator? If so, what type? • Does the person have an authorized representative? • Who pays the bills? • Who manages any bank account(s)? • Where are the person's important documents kept?
<p>Adapt Problem solve with interventions and actions</p>	<p>TEACH PROBLEM-SOLVING STRATEGIES TO CAREGIVER:</p> <ul style="list-style-type: none"> • Discuss with family importance of getting legal/financials affairs in order • Have all necessary documents completed, notarized, and filed in an appropriate place <p>CLINICAL SUPPORT:</p> <ul style="list-style-type: none"> • If financial abuse is suspected, follow standards of practice, policies, procedures and reporting mandates • Guide family to speak with a doctor and social worker about healthcare documents and legal and financial considerations • Refer family to legal services, if needed <p>CAREGIVER SUPPORT AND COMMUNITY RESOURCES:</p> <ul style="list-style-type: none"> • Listen empathically to caregiver and evaluate for level of distress • Refer to low/no cost legal services • Refer to Alzheimer's Greater Los Angeles for support groups, disease education, and care consultation <ul style="list-style-type: none"> ○ ALZ Direct Connect referral ○ Provide 24/7 Helpline #: 844.HELP.ALZ 844.4357.259 ○ Website: www.alzcla.org • Local Community Resources: _____ • Send literature: <ul style="list-style-type: none"> ○ Topic Sheet – "Legal and Financial Issues"

	<p><u>FOLLOW UP:</u></p> <ul style="list-style-type: none">• Schedule a phone call with caregiver to discuss outcomes and provide additional support
	<p><u>NOTES:</u></p> <hr/> <hr/> <hr/> <hr/>