

Preparation brings peace of mind

Planning for your own care



When providing care for a loved one, it's hard to envision your own future needs, when and if the time comes. Having plans in place before you need them could make a night and day difference down the road. Below is a list of items to consider when making a plan for your personal care needs.

1. Build your estate plan:

Work with a financial professional and attorney to create powers of attorney, wills, trusts, and advance healthcare directives.

2. Develop your long term care plan:

Map out a plan if you don't have one, and ensure your care wishes are documented.

3. Plan for future costs:

Incorporate potential long term care costs into your financial plan, whether through insurance or self-funding, and ensure your resources align with your preferred care options.

4. Enhance your financial knowledge:

Learn about estate planning and seek guidance from a financial professional.

5. Secure legal documents:

Complete power of attorney, medical power of attorney, living will, will, and trusts with professional assistance.

6. Plan your end-of-life arrangements:

Decide on funeral or end-of-life wishes, prepay if possible, and record them in your will. Verify all beneficiary information is up to date.

7. Adjust spending and assets:

Monitor your lifestyle and identify sellable assets like cars or property for additional savings.

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