



EXAMPLE OF FAMILY ACTION PLAN FOR GEORGE (84) AND ERMA (81)

ASSETS, INCOME AND CASH FLOW ROOT

MONTHLY INCOME SOURCES	
Pension	\$1,700
Social Security	\$1,200
Dividend Income from Stocks	\$1,500
Interest Income from Investments	\$3,000
Total Monthly Income	\$7,400

MONTHLY EXPENSES	
Housing (Mortgage or Rent)	\$0
Maintenance	\$200
House Cleaning and Yard	\$300
Taxes (Property, Income, Personal)	\$2,500
Utilities (electric, gas, cable, internet, trash, etc.)	\$300
Food and Entertainment	\$700
Phone (landline and cell)	\$150
Auto (gas, maintenance, payment, taxes)	\$300
Insurance (long-term care, auto, property, health, life)	\$800
Gifts and Christmas	\$300
Travel	\$600
Charitable Gifts	\$200
Out of Pocket Health Costs	\$500
Total Expenses	\$6,850

ASSET DISTRIBUTION

ASSETS	
Real Estate	\$500,000
Stocks and Bonds	\$300,000
Investments (Mutual Funds)	\$500,000
Cash	\$100,000
Total Assets	\$1,400,000

WILL AND ESTATE ROOT

George and Erma established a trust and will naming Joe as the successor trustee and personal representative. Power of Attorney for financial and health, Advanced Directive, HIPAA release and any other documents would be uploaded. The physical originals are located in the safe deposit box at the bank. These documents are also uploaded to *The Decision Tree of Aging* secure portal.

SUPPORT TEAMS ROOT

PROFESSIONALS:

- Physicians:** Dr. Smith, Portland Clinic, 503.352.xxxx
- Attorney:** Doug Adams, Adams and Jones, 503.788.xxxx
- Financial Planner:** Kurt James, 503.988.xxxx
- CPA:** Erik Funks, 503.255.xxxx
- Broker:** Joe Plano, 503.466.xxxx
- Decision Tree of Aging Coach:** Mark Duhrkoop, 503.566.xxxx

NON-PROFESSIONALS:

First Baptist Church

- Pastor George Sealy, 503.244.xxxx
- Keith and Emily Stat, 503.315.xxxx

Neighbors

- Diane Hamel, 503.455.xxxx
- Tom and Linda Knopp, 503.675.xxxx

Friends

- John and Patti Fischer, 503.898.xxxx
- Jim and Rachel Cummings, 503.887.xxxx

END OF LIFE ROOT (Brief Summary)

George and Erma do not wish to have any medical attempts to artificially support or extend life. Details are in the Advanced Medical Directive.

George and Erma have pre-arrangements for burial at Miller Funeral Home (papers are in the safe deposit box). This includes plots at the cemetery.

George and Erma have suggestions for their memorial services to be held at First Baptist Church would be uploaded.

Needed information for obituaries would be uploaded.

WHERE TO RECEIVE CARE BRANCH

First Priority: Age in place in the current residential home. (See Transitions Branch for changes)

Second Priority:

- a. Rose Park Senior Living Center
- b. The Woods Community Center

Third Priority: Adult Foster Care with the ability to care for level 3 needs.

WHO WILL GIVE CARE BRANCH

First Priority: Spouse with support of other family members and hired caregiver. Support for household cleaning and lawn maintenance.

Second Priority: If spouse or family member can no longer give care, then Assisted Living or Adult Foster Care option. (See Transitions Branch).

WHEN WILL CARE BE GIVEN BRANCH

IADLs:

Phone - assistance to TTL or voice activated cell phone.

Driving - when spouse and children determine safety issues.

Meals - when no longer capable of meal preparation or weight loss signals loss of self-nourishment.

Housekeeping - when spouse and children determine assistance is helpful.

Laundry - when spouse and children determine assistance is helpful.

Medications - evidence of improper dispensing of medications.

Finances - evidence of missed payments and improper use of funds.

ADLs:

Bathing - when no longer capable for safety reasons to bathe. In home health for assistance, if needed for husband.

Dressing - when assistance is needed on a regular basis for dressing. Spouse will assist.

Toileting - when no longer capable of using the toilet without assistance on a regular basis, this will require a level of assistance that may include moving to a care community.

Transferring - when no longer capable of transferring from bed to chair, the level of assistance required may include moving to a care community.

Continence - if partially incontinent, assistance in the home. If needing a catheter, then the level of assistance required may include moving to a care community.

Feeding - Home care may need to be engaged for assistance.

TRANSITIONS BRANCH

Immediately, the residential home shall begin the downsizing process. Within a year, all non-essential property will be sold, given to children or charities.

Parents choose to stay in the residential home and make modifications as necessary to age in place. This includes assistance with housekeeping, landscaping, and if needed, in home help as detailed in the **WHEN WE WILL RECEIVE CARE BRANCH**.

Parents prefer to hire in-home care when needed rather than use a family caregiver.

When ADLs reach the prescribed level, then a move to a care community shall be carried out.