

FAMILY PLANNING GUIDE
FOR EARLY STAGE ALZHEIMER'S DISEASE

Most families are unsure of what to do or where to turn for help when someone they know has been diagnosed with Alzheimer's disease. This checklist is intended to be a simple guide to aid the family/caregiver in planning for the future of the individual diagnosed with Alzheimer's disease. The Alzheimer's Association is available as an ongoing resource for information and support.

A. MEDICAL CARE ISSUES

- Obtain a medical evaluation
- Talk with a physician about treatment options such as:
 - FDA approved medications for Alzheimer's Disease
 - Experimental drug trials in the area
 - Health care instructions when terminally ill or unable to communicate (furnish physician a copy of Medical Durable Power of Attorney, Living Will, or discuss DNR – Do Not Resuscitate – Directive)
- Gather health information:
 - A list of prescribed and over-the-counter medications
 - Family or medical history (past and present symptoms or changes in abilities)
 - Names, phone numbers, and addresses for physician, pharmacy, dentist and other health providers
- Make appointments, help with transportation, accompany the person and monitor health care as needed

B. FINANCIAL AND LEGAL ISSUES

- Consider consultation with an elder law attorney to discuss legal and financial options:
 - Durable Power of Attorney (medical & financial)
 - Will
 - Long term care financing (Medicaid)(disability planning)
- Locate, review, or update:
 - Insurance policies (health, life, auto, homeowners)
 - Will
 - Funeral arrangements/burial plot
 - Bank books/account numbers
 - Tax Records
 - Vital Numbers (Social Security, Medicare, Medicaid)
 - Names, addresses, phone numbers for accountants, lawyers, insurance agents, brokers
 - Data on Pension Plans, IRA's, Veteran's Benefits, Stocks/Bonds
 - Documents: Car titles, real estate deeds & investments, military history/discharge papers, appraisals for valuables
 - List of income sources (Social Security, pension, dividends, other)
 - List of bills with due dates (monthly, annual, etc.)

C. DAILY LIVING ISSUES

Prepare for changes in abilities of the person with Alzheimer's

- ❑ Discuss and respect the preferences and wishes of the person with Alzheimer's
- ❑ Decide who and when to tell others about the diagnosis
- ❑ Have a family conference to share ideas, concerns, and plans for the future
- ❑ Decide who will be the key person to manage personal and health care matters and legal and financial matters
- ❑ Attend a support group for persons in the early stage of Alzheimer's and their caregiver/family member
- ❑ Learn to recognize signs of stress in yourself and in the person with Alzheimer's and how to respond to it

Evaluate current life-style and changes to be made

- ❑ Share tasks, begin to do more things together, use verbal and visual reminders
- ❑ If you are still working or own a business, begin to make plans for the future
- ❑ Explore options for transportation
- ❑ Evaluate options for in-home help
- ❑ Learn about and visit programs in the community for social/recreational activities, i.e. adult day programs
- ❑ Talk about potential arrangements if unable to live in present home

Assess safety concerns

- ❑ Decide when to stop driving by monitoring and obtaining a driving evaluation
- ❑ Enroll in the Safe Return program – information on the Safe Return program is available through the Alzheimer's Association Helpline (214-540-2400 or 1-800-272-3900)
- ❑ Use reminders or monitor taking medications
- ❑ Observe for change in ability to prepare meals, do personal care, do housekeeping, or pay bills

D. RECEIVE ONGOING CAREGIVING EDUCATION & SUPPORT

- ❑ Call the HELPLINE at 1-800-272-3900 for information about Alzheimer's disease, caregiving tips, resources, research, support and to receive the newsletter
- ❑ Attend informational programs such as the Caregiver Classes that are offered by the Alzheimer's Association
- ❑ Attend a support group – information on locations and schedules for support groups is available through the Helpline
- ❑ Attend the annual conference for families and caregivers – information on this conference for families and caregivers is available through the Helpline

Alzheimer's Association
4144 N Central Expressway, Suite 750
Dallas, TX 75204
Helpline (800) 272-3900 www.alzdallas.org