

Quick Guide:

Vital Information for First-Time Caregivers

Use this document to create a practical, thoughtful approach to caring for your parent or older family member. As you work through this guide, keep in mind that it is not exhaustive and should be used as a starting point.

Discuss care with your parent

The opportunity to express one's preferences and concerns regarding their care can be empowering, so make sure your parent is involved in as many decisions as possible.

Talking points	Key takeaways
_____	_____
_____	_____
_____	_____
_____	_____

Don't be afraid to talk about money

Broach the topic of finances carefully. When the time is right, take stock of any savings or assets your parent may have, and determine how much you and other family members are able to contribute to care costs. The earlier you have this discussion, the more time there will be to save for services or a transition to a senior living community.

Assets	Account info	Balance
Checking account	_____	_____
Investment account	_____	_____
Retirement account - IRA, 401k	_____	_____
Savings account	_____	_____
Other _____	_____	_____
Debts	Account info	Balance
Car loan	_____	_____
Credit card debt	_____	_____
Mortgage	_____	_____
Other _____	_____	_____
Other _____	_____	_____

Future expenses	Estimated cost
Home safety modifications	_____
Assistive equipment	_____
Medical bills, copays	_____
In-home care	_____
Legal/financial fees	_____
Assisted living*	_____
Other _____	_____

Current monthly expenses*	Estimated cost
Care services	_____
Fitness and social opportunities	_____
Groceries	_____
Home or renters' insurance	_____
Housekeeping and home repairs	_____
Laundry service	_____
Lawn care and landscaping	_____
Mortgage or rent	_____
Personal appearance services (hair, nails, etc.)	_____
Property insurance and taxes	_____
Transportation	_____
Utilities	_____
24-hour security	_____
Other _____	_____

*Comparing in-home care costs to those associated with a move to an assisted living community is a key consideration.

Know what to expect

Obtain a general understanding of any conditions, disabilities or degenerative illnesses your parent may have that may possibly impact the level of care they require. Ask their doctor for as much information as you can so that you can make informed decisions and be prepared for the future.

Notes

Familiarize yourself with any medications your parent is taking, the purpose of each and any side effects. Forgetting to take medication is a common sign of aging, so be prepared to help.

Medication name	Dosage	Instructions

Locate available resources

Thoroughly research and explore all options – such as day programs and in-home care – that could help your parent prepare for a transition to assisted living or memory care, should the need arise. **Tip:** If you know anyone who has navigated a similar situation, ask for their advice or recommendations.

Adult day services

Assisted living communities

Companions/visitors

Home care agencies

Senior centers

Short-term stay options

Transportation services

Assemble a care team and plan

Ask for help from family, neighbors or care professionals. Everyone can play a meaningful part in caring for your parent. Even a simple phone call to keep loneliness at bay can make a big impact.

Care task	Name	Preferred method of contact/info

Care for yourself

It's vitally important that you make sure your needs are met so you can continue providing the best care for your parent. Below, make a list of routines and events that are important to you. For example, a date night with your spouse or semi-monthly wellness appointments that you can't miss.

Things that are important to me

Use the space below to create your self-care plan. Make sure you're getting enough sleep, eating well and exercising. If things become overwhelming, consider talking to a therapist.

My self-care plan
