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THIS MONTH

June 2018

## Do your legal documents need a tune up? Or do Mom or Dad's?

As we plan for the “what ifs” of life, most of us have a Living Trust, Advance Health Care Directives and sometimes a Durable Power of Attorney for Finances. You may even have the newer POLST form (Physicians Orders for Life-Sustaining Treatment).

That is all good – or is it?

My experience over these past 30-plus years working with older individuals (as well as adult children who become the advocate for a parent that has lost capacity) is that these documents were often not activated properly.

In other cases, the person who will take over has not been asked or notified of their responsibility. Documents are often unclear. Frequently, they are either too specific or not specific at all -- leaving the individual who has to make decisions in a dilemma.

Another common error many individuals or couples make is that they don't have a meeting to discuss the options with those they have named to take over. They need to discuss the care and how they want life to play out if they lose capacity (the ability to make sound decisions).

Life, families, health, finances and communities change over time, impacting your legal documents. Do you review your documents annually? Is everything the same? What has changed? Have there been divorces, deaths or births of new grandchildren? Is that non-profit you want to bequeath to still in operation, or have you changed your mind about them or want to add another wonderful organization to your list?

I recommend reviewing annually on the month of your birthday or the wedding anniversary for couples. Also, I highly recommend calling your attorney with changes in your life. Check in to see if there have been changes in laws or processes that might affect your legal documents.

Our legal documents need “tweaking” – just like our

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### About our Founder



Linda Fodrini-Johnson, MA, MFT, CMC is a Licensed Family Therapist and Certified Care Manager. She has been practicing professional care management (now

called aging life care) since 1984. Linda founded Eldercare Services, a full-service care management and home care company in 1989, which now employs over 200 caring people. Eldercare Services has been providing Bay Area families with care management, home care services (caregiving), advocacy, counseling, support groups and education for 28 years.

### MONTHLY AFFIRMATION

**“I rest assured that my needs  
are met with my values  
leading the way.”**

medications, bodies, and environment about every five years or so to assure us that our wishes have been made clear.

Those of us who are reasonably healthy have a difficult time seeing ourselves as having lost capacity. However, on this journey, most of us don't just die – we have a period of dependence before death that can last for many years. At any time, we might not have the capacity or energy to manage our affairs.

Dementia, such as Alzheimer's disease, affects about 50% of us over the age of 80. Do you have a specific plan for that illness? I do -- because I had the honor of working with so many successful individuals that have weathered that journey. My family knows exactly what I want and don't want. It is in writing.

I also feel strongly about my family finding a professional advocate, someone like me or one of our professional Care Managers (also called Aging Life Care Professionals) to guide them. I had my attorney put the precise language into my Advanced Health Care Directive and my Power of Attorney for Finances as well.

Each of us has desires and wishes to be followed. We need those details integrated into our legal documents. We also need to have meetings with our family or advocates so they understand what we would like to see if we do lose capacity.

I had a client several years ago with four children, all successful professionals (as was their mother). Before our family meeting, I met with my client privately and she told me her desire was for one of her children to inherit and live in her home, which was designed by a famous architect.

She had never mentioned this to them, and I was permitted to bring up the subject at our family meeting. Two of the children were interested and agreed to flip a coin to see who would be the one to inherit that asset. The details were worked out in their legal documents. Everyone understood, and my client was delighted.

Our Speaker Series this month on June 15, 2018 from 2-3:30 PM is entitled, "Incapacity Provisions in a Trust." It's presented by attorneys Joan Grimes and Jennifer Wallace.

The goals are:


- ▶ To learn how to maintain your independence on your terms, for as long as possible;
- ▶ Learn how to properly draft a Trust that outlines what you would like done in the event of incapacity;
- ▶ Control how your assets are used for your care

If you would like to attend, RSVP at 925-937-2018.

Have life your way!

## Upcoming Events

### Dementia – Understanding Behaviors and Finding Solutions

 June 4<sup>th</sup> ⌚ 5:30pm – 7:30pm


**Presented by:** Gillian Notman, CMC

- ▶ Tools on how to have conversations about needs when denial is present
- ▶ Giving you permission to “stretch the truth” for dignity, safety and self esteem
- ▶ Understanding the different types of dementia
- ▶ Understanding why the right diagnosis is important

Classes are intended for family caregivers or those dealing with the challenges of aging.

No fee. <https://eldercareanswers.com/registration-1/>

### Friday Speaker Series – Incapacity Provisions in a Trust

 June 15<sup>th</sup> ⌚ 2:00pm – 3:30pm


**Presented by:** Joan M. Grimes and Jennifer Wallace – Law Office of Joan M. Grimes

By reviewing your trust provisions, you can be sure that your assets are utilized the way you want.

- ▶ Maintain your independence on your terms for as long as possible
- ▶ Learn to properly draft a trust that outlines what you would like done in the event of incapacity
- ▶ Control how your assets are used for your care

No fee. <https://eldercareanswers.com/registration-2/>

### Caring for someone with dementia – reducing your stress

 June 20<sup>th</sup> ⌚ 5:30pm – 7:30pm

**Presented by:** Linda Fodrini-Johnson

Riding the roller coaster of dementia care? If the emotional ups and downs are making your head spin, this class is for you.

- ▶ The major challenges of dementia care
- ▶ Responses and reactions to reduce your stress
- ▶ Self-care activities and mini-support group
- ▶ Resources for coaching and support

Classes are intended for family caregivers or those dealing with the challenges of aging.

No fee. <https://eldercareanswers.com/registration-4/>

## Location of Events:

Eldercare Services, 1808 Tice Valley Blvd., Walnut Creek, CA 94595