

# Client Health-care Needs Checklist

AGF SOUND CHOICES

## Health-care Planning

Below is a list of activities to undertake when looking into you or your loved ones health-care needs as you age.

- Talk to your family or friends about your health issues and concerns
- Think about what is important to you as you get older:
  - Where you want to live
  - Who would be available to help you
  - Who you want to be close to
  - What trade-offs you would be willing to make, for example, to stay in your own home, or to live in an apartment
- Talk to your doctor, and ask:
  - What you can expect in the next few years given your health conditions? Any preventative measure?
  - Who else could be involved in helping you plan your care? What are some of the health-care decisions you may need to make in the next few years?
- If you are not comfortable with the health information you receive from your current providers, you can ask for a second opinion
- List out all of your assets and liabilities, including account numbers, put the list in a safe place, and notify a trusted person of its location
- Hire or consult with a lawyer, and bring to the appointment a family member/trusted caregiver who can help you
- Create or update an Advance Care Plan (living will)
- Select a person to appoint for Power of Attorney health, and Power of Attorney finance
  - Understand what this person can help with what's expected, and when that would start
- Look into living arrangements for both the short term and long term:
  - Make a list of what is important to you in your search for another home
  - Determine affordability – how long would you be able to afford each option?
  - Compare your list to what you learn about other living options
  - Where it is located? Close to amenities?
  - Rank your choices
- Contact a neighbour or friend close to home to be an emergency contact with access to your home, and provide them with the name and contact information of your Attorney for Personal Care (POA)

- Ask yourself if it is still feasible and safe to continue driving
- Ask yourself, "When will I know it is time to move to a more supportive living environment?" – and share your answer with your POA
- Look into community resources in your area to find out what help you can receive, how much, how often, and the cost, including hiring a personal care worker
- Research long-term care facilities, including location, activities, costs, services, reviews, etc.
- Consult with your family on what level of help they can provide and how often
- Schedule regular appointments with your doctor to check on your health status, what you can do to best manage your conditions, and how you can prevent avoidable declines in your health

Please note this checklist is provided as a general source of information only as a guideline, it is not meant to be comprehensive, and does not provide advisors or individuals with any opinion regarding the implementation of this tool. Investors should consult with their financial, tax, legal and health advisors before making any decisions. Every effort has been made to ensure accuracy at the time of this publication, however accuracy cannot be guaranteed. AGF Management Limited takes no responsibility for any reliance on the information contained herein.

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