



Family First
Senior Care

The Role of Aging Life Care Managers in Estate Planning

**Presented by Jennipher Ama, RN CMC
and Rhonda Spangler BASW**

Family First Senior Care

Jennipher Ama - Founder & Aging Life Care Manager

- Registered Nurse and Certified Care Manager
- Founded Family First Senior Care in 2005
- Previous Board Member and President of Washington Home Care Association
- Previous Board Member for the National Association for Women's Business Owner's Northwest Chapter



Family First Senior Care

Rhonda Spangler – Aging Life Care Manager

- Social Worker with Specialty Focus on Aging
- Has worked as a Care Manager for Over 10 Years
- Home Stay Parent to Two International Students





Family First
Senior Care

Home Care

- Provide HCA and CNAs
- Work in any setting
- Awarded Best of Home Care Provider of Choice Award for past 9 years



Aging Life Care Management

- Registered Nurses and Medical Social Workers
- Service as professional advocates and guides

Looking Ahead



56 million Americans Will be
65+ by 2020



The Population of Those 80+
is Set to Triple by 2040

Looking Ahead

70% of those
65+ will **NEED**
assistance at some
point in their lives

40%
CURRENTLY
need assistance

The Estate Planning Team

- Traditionally Includes an Attorney, Accountant, Financial Advisor and Sometimes an Insurance Professional.
- Family Systems are Changing
- Healthcare Systems are Complicated to Navigate
- Growing Need for Aging Life Care Managers

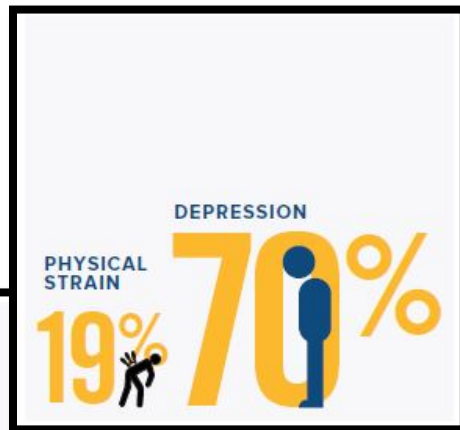


Mobile Society



Adults 60+ with one or more adult children, live **MORE** than **280 miles** from their nearest child

Assistance for Family Caregiver



Family Caregivers Report:

- Higher Levels of Physical & Emotional Illnesses
- More Challenging Work-Life-Care Balance
- Greater Risk of Life-Threatening Health Problems



60%
WORK



61%
MAKE WORKPLACE
ACCOMMODATION



Aging Life Care Management

Who is an Aging Life Care Manager?

- RN's & Social Workers Who Specialize in Acting as a Guide and Advocate for an Older or Disabled Adult
- Meet Stringent Education, Experience and Certification Requirements
- Also Known as a Geriatric Care Managers



Who Care Managers Work With

Who Do Care Managers Work With?

- Those Who Are Without Decision Makers
- Have Families Who Live at a Distance
- Are Overwhelmed by Care Options for Themselves or For a Loved One
- Those With Increased Family Dynamics



Services Are Tailored To Client's & Family's Needs:

- Short-Term Needs
 - Housing and Long Term Care Insurance Advocacy
- Long-Term Needs Including:
 - Advocate for Healthcare, Medical Oversight, Assist With Communication on Medical Issues
- Frequency of Services

Aging Life Care Management

ALCA
8
knowledge
areas



How To Get Started

Consultation or Comprehensive Assessment

The Assessment Process Includes:

- Health & Wellness
- Memory & Mental Health
- Social Support Networks
- Financial Resources



Craft a Long-Term Care Plan that Ensures the Estate Plan Matches the Reality of the Client's Situation Both Now and Into the Future.

Recommendations & Resources

After the Assessment

- Provide recommendations to vetted resources
- Simplified Options for Decision Making
- Attorneys, Trustees and Guardians rely on Care Managers to determine appropriate levels of care for clients and make recommendations for specific services that meet their clients' needs.



Managing Resistance

- After Appropriate Resources are Identified, Many Families Have Difficulty Getting the Older Adult to Agree to Care.
- Aging Life Care Managers Take the Time to Understand Their Fears and Concerns.
- Help Older Adults Understand That the Use of Care Isn't a Sign of Disability.
- Often Able to Eliminate the Need for a Guardianship.



Family Discord

- Planning for Future and Financial Discussions Often Uncover Existing Family Issues and Discord
- Care Managers Grow to Understand Clients & Their Families as a System or Unit
- Unbiased Advocate Who Assists With Important Decisions
- Work With Each Family's Dynamics
- Strong Focus on Relationship Building



Guardianship and Competency

- Assist in Determining the Level of Cognitive Functioning of a Client.
- Trained in the Use of Various Cognitive Assessments That Can Play an Important Part in Determining Incompetency.
- Facilitate the Collection of Relevant Medical Documentation.
- Creating a Plan for Post-Guardianship is Also Part of This Critical Role.
- Act in the Role as a Health Care Advocate for Older Adults Who Have a Guardian.

Exploitation



- Assess for Warning Signs of Vulnerability.
- Knowledgeable About Strategies for Preventing Acts of Exploitation.
- Act as Advocate When Family is Absent.
- If a Family Member Presents the Greatest Threat - Provide an Additional Protective Barrier Between Areas of Risk and Older Adults.

Housing Specialists

- Assist with Planning for Appropriate Level of Housing
- No Referral Fees!
- Plan for Long-Term Picture Versus Short-Term
- Base Recommendations on Knowledge & Experience of Area Adult Family Homes, Retirement Communities and Skilled Nursing Facilities



Placement Process

- Perform a Thorough Assessment
- Consider Future Care Needs
- Evaluate Finances and Resources Available
- Evaluate Potential Housing Options
- Set up/Attend Tours
- Negotiate terms of contract, rate, availability
- Plan for Move and Assist With Move as Needed



Healthcare Advocate

Specialize in Managing Care for Those with Chronic Illness, Mental Health or Dementia

- Manage Emergency Room Visits, Hospitalizations & Rehab Stays
- Family Liaison for Those Who Live at a Distance
- 24/7 Emergency Contact for Client
- Attend Doctor Appointments
- Facilitate Communication Between Doctor, Client and the Family
- Coordinate Care Across All Areas: Hospital, Rehab, Nursing, Home Health, Home Care

Other Aging Life Care Services

- Healthcare Power of Attorney
- Care Contracts and Care Planning
- Medicaid Planning
- Long Term Care Insurance Claims Advocate
- Care Coordination
- Advocate/Surrogate Family Member
- Adult Family Home Assessments
- Crisis Management and Problem Solving



Any Questions?



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