Being a family caregiver comes with many responsibilities.

The caregiver must make financial decisions for themselves and the care receiver. The decisions have to be in the best interest of the person in need and work for the rest of the family.

An important topic of consideration is the caregiver’s retirement if he or she reduces or gives up employment to care for another family member.

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From 1:00 - 3:00 PM.
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Butler County
320 N. Main Street
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www.extension.iastate.edu/butler
Planning Ahead

- Enables informed decision-making based on accurate financial documents.
- Reduces the added stress of having to make long-term care plans when a crisis has occurred and options may be limited.
- Ensures the care receiver still has the capacity to sign legal documents.
- Gives families an opportunity to ask and understand the wishes of the care receiver. A focus point to resolve conflicting views.
- Identifies the funds available to pay for long-term care and their sources.
- Enables the development of contingency plans and respite care depending on the progression of care needs.
- Can improve the current and future financial well-being of the caregiver.

Topics

1 • Understanding Your Starting Point
   - Completing Worksheets

2 • Why It’s Essential to Plan
   - Wills, Living Wills
   - Durable Power of Attorney
     - for Health Care
     - for Financial Matters

3 • Caregivers: Don’t Forget to Plan for YOUR Retirement
   - Retirement Plans - Ways to Continue Tax-Deferred Savings While Caregiving

4 • Paying for Care
   - Long-Term Care Insurance
   - Veterans Benefits
   - Medicare and Medi-gap
   - Medicaid
   - Other Options

5 • Effective Communication
   - Taking Time and Planning Ahead