



Aging in Place Creating a Supportive Home For Your Future



Schluter & Hughes
LAW FIRM PLLC

Meet the Team

Offering expert guidance to help you plan your path



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CARE COORDINATOR

- ✓ Estate Planning
- ✓ Estate & Trust Administration
- ✓ Elder Law
- ✓ Probate
- ✓ Fiduciary Tax & Accounting
- ✓ Care Coordination
- ✓ Independent Trustee Services

AGENDA

01 | FACTS: RECOGNIZING
THE CHANGE

02 | GETTING YOU AND YOUR
HOME READY

03 | LET'S TALK ABOUT YOUR
CARE AND SUPPORT TEAM

04 | PUT YOUR PLAN IN
ACTION
MAKING IT LEGAL

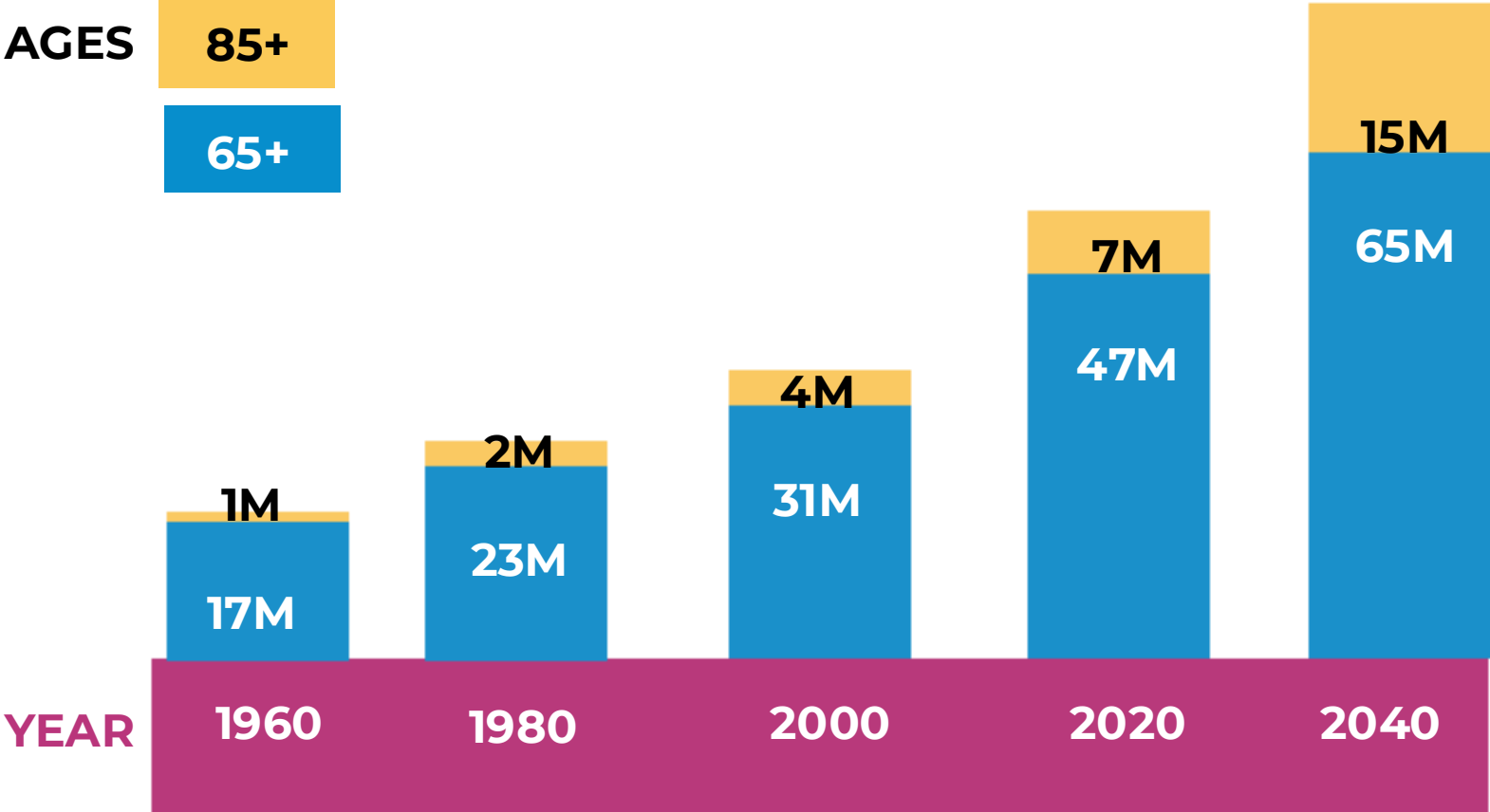
05 | QUESTION & ANSWER
SESSION

Over 75% of adults
50+ want to remain
in their homes for as
long as possible
Fewer than one-third
have taken steps to
ensure their home is
suitable for aging in
place



Number of Older Americans Needing Care

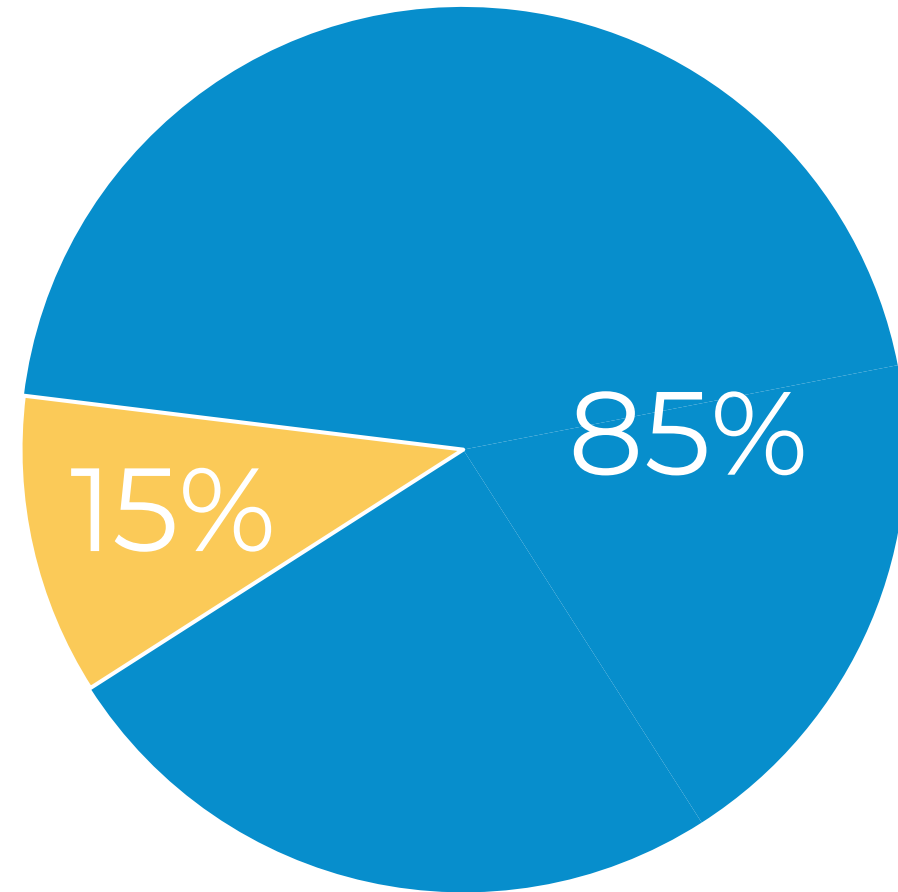
The number of Americans ages 65 and older will reach 80 million in 2040.



Source: U.S. Census Bureau

Chronic Health Conditions Age 65+

Nationwide, 85% of adults over 65 are living with a chronic condition, such as arthritis, asthma, cancer, cardiovascular disease, chronic obstructive pulmonary disease or diabetes.



Source: Forbes

1 in 4 people 65+ falls each year

Falls are the leading cause of injury-related death among adults aged 65+

Only a 50% survival rate at 1 year following a hip fracture in elderly patients



Falls Can Be Prevented

EXERCISE **ELEVATE YOUR**
HEART RATE

MEDICATIONS **AVOID A PILL**
FOR EVERY ILL!

EYE EXAMS

WEAR SHOES THAT FIT



5 Easy DIY Home Modifications

Half of falls take place at home



1. **SECURE SOME SUPPORT** **DISABILITY MADE EASY** Buy a shower seat, grab bar, and adjustable-height handheld shower head to make bathing easier and safer



2. **LIGHT IT UP** Replace lightbulbs with bright, non-glare lightbulbs



3. **HAVE A SEAT** Place a sturdy chair in your bedroom and bathroom so you can sit while getting dressed, shaving and applying makeup



4. **CLEAR THE WAY** Keep items off the stairs, fix simple but serious hazards such as clutter and throw rugs



5. **STORE FOR SUCCESS** Keep frequently used items between your waist and shoulder height

Do You Live Alone?

Heath & Home Go Hand in Hand



Give House Keys to Your Patient Advocate or Designated Person



Give Your Smart Phone Screen Password to PA/POA



Medical Alert Jewelry



Keep Emergency Information by Your Refrigerator



Build a “Professional Family” Support System



Physical Activity & Proper Nutrition

Smart Living Technology

- Video Doorbells
- Smart Locks & Home Alarms
- Medical Alert & Fall Detection Sensors - Wearable Devices



A support
system
matters
Build your own
or consider
creating a
“Professional
Family”



The Role of a Care Coordinator

The goal of care management is to understand a person's needs and preferences so that it may be communicated at the right time to the right people, to provide safe, appropriate, and effective care.



What can a Care Coordinator do for you & your family?

Care plan creation & implementation

Routine wellness checks

Arrange and monitor home health and facility services

Attend doctor appointments on request

Protecting from telemarketers/financial abuse

Arrange and schedule personal caregivers

Flexible care – use services more during emergencies, less when life is stable



Coordinate medical & self-care appointments

Evaluating for signs of poor nutrition and self care

Monitoring refrigerator for expired food

Update family members who live out of state

Assist families with any issues/conflicts at senior living facilities

Connect families with useful community resources

Provide enrichment activities and trusted companionship

Stay Connected Stay Active

More than 1/3 of
adults ages 50 to
80 report feelings
of isolation and
loneliness



Senior Living

Housing & Care Options



Independent Living



Assisted Living



Memory Care



Skilled Nursing/Rehab



Adult Foster Home



Many Americans do not have their essential legal documents
Only 37% of U.S. adults have an Advance Directive/Living Will
55% of U.S. adults have a Durable Power of Attorney

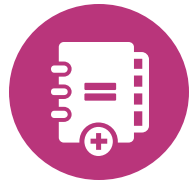


Source: Pew Research Center, American Bar Association

Care Plan: 3 Main Topics to Talk About

What to ask yourself and talk to your loved ones about

Gather information necessary to keep moving forward on planning for your future



ADVANCE CARE PLAN & ADVANCE DIRECTIVE
What are your ideas for your future medical care?



HEALTH
Who do you want to help with your medical care decisions?



WEALTH
Who do you want to help with your finances?

Make a list

Create an Asset
Inventory

Help those who may
need to locate your
bank information,
medical records and
passwords



Share Your Emergency Information & Estate Plan Documents



OVERVIEW Estate Planning

4 essential documents



Revocable Living Trusts

Let's you transfer ownership of your assets - home, bank accounts, or investments- into a trust that you control during your lifetime

WHY IT MATTERS FOR AGING IN PLACE

A tool for avoiding probate

Customizable to meet your wants and wishes

Flexibility to change or revoke it at any time

Plan ahead for when you may need help

Helps protect future beneficiaries



Deed Planning

Planning how your home is titled now can save your heirs time and money later

Many planning tools available to ensure your home transfers free of probate

“Lady Bird Deed” to transfer to your children or your trust

WHY IT MATTERS FOR AGING IN PLACE

Can reduce legal costs and court delays

Let's you retain full control of your property while alive - with TOD deed

Liability protection from creditors and lawsuits



Beneficiary Designations

Ensure all accounts like checking and savings, 401(k)s, IRAs, and life insurance have a beneficiary designation

WHY IT MATTERS FOR AGING IN PLACE

Ensures quick access to funds for your loved ones without probate

Allows you to keep control now but plan clearly for the future

Prevents conflicts or delays by keeping everything up to date with your current wishes

Review all beneficiary forms every few years especially after major life changes

Name both primary and backup beneficiaries



Patient Advocate Duties



HIRE medical professionals



CONSENT to treatment



WITHDRAW or **REFUSE** treatment



COMMIT to psychological evaluations or therapeutic procedures

Financial Duties of Your POA

You Establish What Authority Your Agent Has To Take Action on Your Behalf

Under The New Act, These Powers Must Be Expressly Authorized In The DPOA To Be Effective



**SIGN YOUR
CHECKS AND
PAY BILLS**



**MAKE
DEPOSITS
FOR YOU**



**SELL
YOUR
PROPERTY**



**CONTRACT FOR
MEDICAL OR
OTHER
PROFESSIONAL
SERVICES**



**FILE
TAX
RETURNS**

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Or contact us online at SchluterHughesLaw.com

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Thank You!

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