Dementia Family Wishes and Care Checklist

What would you want your family to know

Name or household: _____ Date: _____

Next review: _____

Where to begin

The people close to you may know you well. It still helps to tell them what brings you comfort, how you'd like to be included and what support they could manage if you needed care. Use this worksheet to start that conversation while you can take part.

How to use this checklist

• Work through the sections that apply to you. Involve the people who need to take part.

• Tick an item once you've reviewed it and can answer it. Circle anything that's unclear or needs attention.

• Choose one priority and one question to address next. You don't have to settle everything at once.

Keep your information private

Don't record account or policy numbers, passwords, identification details or medical information here. Keep the completed worksheet in a secure place.

I help people make clearer decisions today, before life forces harder ones later.

This worksheet records discussion points. It isn't a clinical care guide, a legal document or permission for someone else to make decisions.

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1 What matters to me

☐	I've shared the music, people, stories, routines and activities I enjoy.
☐	I've explained what helps me feel comfortable and what tends to upset me.
☐	My family knows how I'd like to be included in meals, visits and daily life.
☐	We've discussed my cultural, spiritual and personal wishes.
☐	The people close to me know where to find these wishes.

What needs attention: _____

2 How I'd like to be treated

☐	We've talked about speaking to me as an adult and including me in the conversation.
☐	We've discussed giving me time to respond and checking what I'm trying to say.
☐	I've explained how I'd like people to introduce themselves and offer help.
☐	We'll support choices I can still make and ask the care team when we're unsure.
☐	We'll revisit my wishes with me as my needs change.

What needs attention: _____

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3 Who could help with decisions

☐	I've spoken with the people I trust about the help I may need.
☐	The people I've named understand the role and are willing to act.
☐	I've asked my lawyer about a Continuing Power of Attorney for Property.
☐	I've asked my lawyer about a Power of Attorney for Personal Care.
☐	We know where the current documents are stored and whom to contact.

What needs attention: _____

4 What care at home could involve

☐	We've discussed where I'd prefer to live if I needed more support.
☐	We've considered help with meals, personal care, transport and daily tasks.
☐	We know which questions about safety and care belong with my healthcare team.
☐	We'll ask about public, community and paid services available locally.
☐	We've discussed what would happen if staying at home no longer met my needs.

What needs attention: _____

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5 Support for the people providing care

☐	We've talked about what family members can manage alongside work and other needs.
☐	We know whom the main caregiver could ask for help.
☐	We've discussed breaks, respite and paid help when needed.
☐	We've agreed that asking for help doesn't mean someone has failed.
☐	We know how to contact the local Alzheimer Society for information and support.

What needs attention: _____

6 How care could be paid for

☐	We've discussed which income would continue if care were needed.
☐	We've considered what paid help, home changes and time away from work could cost.
☐	We've reviewed savings or other accessible money set aside for care.
☐	We know what existing insurance may cover and which terms need confirmation.
☐	We've identified questions for our insurance advisor, accountant or other professionals.

What needs attention: _____

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7 Records the right people could find

☐	A trusted person knows where key legal and financial documents are stored.
☐	We have a secure list of the professionals and institutions to contact.
☐	We've reviewed beneficiaries and insurance arrangements where needed.
☐	Passwords, medical records and private details are kept separately and securely.
☐	We know how to update the records when something changes.

What needs attention: _____

8 What we'll do next

☐	We've chosen one question to discuss first.
☐	We know who should be part of that conversation.
☐	We've set a date to review these wishes again.
☐	We'll review after a diagnosis, move, family change or change in care needs.
☐	We'll keep the person receiving care involved as much as possible.

What needs attention: _____

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Questions worth discussing

1. What would help me feel comfortable, included and respected?
2. Which wishes have I not yet shared?
3. Who could act, and what documents still need review?
4. What could my family manage, and where would outside help be needed?
5. How would we pay for care and support the main caregiver?

Choose one next step

Start with the issue you most need to clarify.

The issue I want to review

_____

One question I need answered

_____

Who needs to be involved

_____

My next action and target date

_____

How I can help

As an Elder Planning Counselor (EPC), I can help you discuss later-life needs, review your insurance and consider how care could be paid for. Care decisions belong with your healthcare team. Legal documents belong with your lawyer.

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For education and family discussion. This worksheet isn't a clinical assessment, care plan, legal document or individual recommendation. Ask your healthcare team about care and your lawyer about decision-making documents. Insurance services are available to Ontario residents. Eligibility, benefits, costs, limits and exclusions depend on the applicable contract.

Official starting points

Alzheimer Society of Canada: alzheimer.ca/en/help-information/im-living-dementia/planning-your-future

Alzheimer Society of Canada: alzheimer.ca/en/help-support/im-caring-person-living-dementia/providing-day-day-care/decision-making-respecting

Ontario: ontario.ca/page/make-power-attorney

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