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An illustration featuring a large, stylized orange hand reaching down from the top of the page, cupping a man and a woman. The man, on the left, has grey hair, a beard, and glasses, wearing a red sweater with white heart patterns. The woman, on the right, has short grey hair and is wearing a white sweater with black polka dots and teal pants; she is holding a pair of glasses. The background is a light blue sky with stylized clouds. The entire scene is framed by a white, torn-paper-like border.

# A helping hand

**CAREGIVERS GUIDE AND WORKBOOK**

An illustration on the left side of the page shows a man with glasses and a woman in a patterned sweater. They are in a purple-toned environment with abstract shapes. The man is looking thoughtful, and the woman is looking towards him.

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# Introduction

An important concern for all of us as we age is to retain our independence and sense of autonomy. Often there is a fear that the loss of independence will result in a loss of dignity and purpose. As a result, aging seniors are often reluctant to accept or ask for help.

It is estimated by the Canadian Health Care Agency that about 1 in 4 Canadians are involved in caregiving in some form. Caregivers contribute an estimated \$25 BB of unpaid labor to our healthcare system. CHCA also estimates that about ½ of caregivers are aged 45 to 65. This is often their peak earnings years, which leads to juggling of work and caregiving responsibilities. Caregiving also encompasses many aspects of a loved one's life. This workbook is designed to provide a little help.

## There is no right or wrong way when it comes to how you establish a care plan.

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We hope this workbook will help you, as a caregiver, feel more organized and that it may help engage your loved one accepting help.

All the best in your journey.

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# Changes and stages

One misconception is that all forms of caregiving lead to a loss of independence. The truth is that there are various stages of caregiving that has been identified by various advocacy groups. The challenge is to recognize these different stages and the role for the caregiver in each stage.

## **Independence Stage**

The Independence Stage is just as the name implies. Seniors in this stage may experience some of the normal discomforts of aging but are aging in place and perfectly capable of taking care of themselves. Help from family members may be informal and irregular. This is the time for seniors to proactively plan for their future needs. Discussion about who may become the agent for financial needs or personal care can be open and candid at this stage in life.

## **Interdependence Stage**

The Interdependence Stage is when seniors who are still living on their own may need help with household chores or are experiencing further health care issues. Family members are still able to provide care, but the time commitment may increase, or the level of care may become more demanding. This is often a time when families accept some form of formal help from outside agencies.

## **Supportive Living Stage**

The Supportive Living Stage is when mobility issues or other health care concerns may require family members and seniors to accept more formal assistance in the home. This stage is when families and seniors often begin considering moving to assisted living or retirement facilities.

## **Complex Care Stage**

The Complex Care Stage is the point where it is difficult to live at home. Physical and mental health may be diminishing and may require a variety of treatments and therapies. The cost and requirements of even formal care in the home may be too great for the senior.

## **Dependance Stage**

The Dependance Stage is when families recognize that the wellbeing of an ailing senior and well as the family caregivers would be better served in a healthcare facility. Because the senior would require constant assistance for all aspects of daily living most families and seniors feel safer accepting services from care facilities. Family members could not provide the quality or amount of care that a staff of professionals do at these facilities.

# Household checklist

## Service Providers

Company	Contact person	Phone	Email
Cleaner	_____	_____	_____
Electrician	_____	_____	_____
Landscaper	_____	_____	_____
Plumber	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



# Home safety checklist

## Inside and outside the home

- Check smoke and carbon monoxide detectors – two times per year
- Check that the house number is clearly visible from the street – in case of emergency
- Home inspection for heating system and fireplace safety
- Flashlights in accessible locations such as nightstands, kitchen
- Install sensor lights outside doors, garage for security
- Extra set of keys available with family or neighbours

## All rooms

- Install nightlights in bedroom, bathroom, hallways, stairs etc.
- Clear pathways and clutter to avoid trips or falls (remove loose rugs)
- Install or secure handrails in stairways
- Remove unstable furniture that may cause falls (stools, rolling chairs, three leg tables etc.)
- Check that lighting is adequate in rooms, hallways, stairways. Replace burnt out bulbs
- Arrange furniture to facilitate mobility
- Ensure pathways and steps around the house are clear of clutter and tripping hazards

## Kitchen

- Remove clutter from kitchen countertop
- Clearly mark “OFF” position for stove and oven
- Cleaners and chemicals stored safely in original containers

## Bedroom

- Place a telephone close to bed for easy access at night
- Install nightlights at convenient height for senior

## Bathroom

- Ensure bathrooms have bathmats to reduce slipping on wet floors
- Install grab bars in bathroom close to shower and toilet
- Add rubber mat to reduce slipping
- Consider bath seat or shower seat if applicable
- Consider clearly labelling “HOT” & “COLD” faucets
- Store medicine in original packaging with instructions
- Medicine stored in location that children or adults with dementia cannot easily access

# Financial and legal checklist

## Legal and financial service providers

<b>Provider</b>	<b>Name</b>	<b>Company</b>	<b>Phone</b>	<b>Email</b>
Accountant	_____	_____	_____	_____
Bank contact 1	_____	_____	_____	_____
Bank contact 2	_____	_____	_____	_____
Executor	_____	_____	_____	_____
Insurance life	_____	_____	_____	_____
Insurance home/auto	_____	_____	_____	_____
Investment & planning	_____	_____	_____	_____
Investment & planning	_____	_____	_____	_____
Lawyer	_____	_____	_____	_____
_____	_____	_____	_____	_____

## Document records

<b>Provider</b>	<b>Location</b>
Birth certificate	_____
Healthcare card	_____
Insurance policies	_____
Marriage certificate	_____
Power of attorney	_____
Safety deposit box & key	_____
Title to properties	_____
_____	_____
_____	_____

## Digital records

### Manage money

Bank login

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Loyalty login Aeroplan etc.

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Retail cards

---

Online accounts Amazon etc.

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### Social media

Facebook

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LinkedIn

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Pinterest

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### Email & webmail

Gmail

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Outlook

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### Other

Digital photos

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### Password management services

- Nord Pass
- Last Pass
- Bitwarden
- IPassword



# Healthcare checklist

## Medical professional service providers

Note – Your identity needs to be documented with your loved one’s medical professionals.



Provider	Name	Company	Phone	Email
Doctor primary	_____	_____	_____	_____
Doctor specialist	_____	_____	_____	_____
Doctor specialist	_____	_____	_____	_____
Dentist	_____	_____	_____	_____
Personal support	_____	_____	_____	_____
Pharmacists	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## Weekly medicine chart

Name & dosage	Size, shape, colour	When to take	S	M	T	W	T	F	S
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Personal medical history

**In the hospital for (list conditions)**

**Date**


**Have had these surgeries**

**Date**


**Have these allergies**

**Date**


**Have had these immunizations**

**Date**


# Having the conversation

Many seniors avoid discussions regarding long term care and many family members also avoid this topic because they are sensitive to their loved one's attachment to the family home. While aging in place is a desired option for many Canadians, there may come a time when it is impractical, necessary, or simply unsafe for your loved one to continue to live alone. A move to an assisted living or care facility may be necessary. Having an honest and frank discussion with a loved one early, before a crisis precipitates a move, may make the transition easier for the senior and caregiver.

- Choose a time to talk when there are no distractions or other obligations. Share your concerns or feelings.
- Stress your role as an advocate.
- Ask about their questions or concerns regarding a move. End the conversation with a plan.

There are different senior living options that vary with level of care required.

- Active adult communities \*plus 55 Independent living communities
- Assisted living residences (Independent and Assisted Living are often combined)
- Nursing homes
- Continuing care



# Capacity assessment

As part of the transition process, you will likely need to assess your loved one's strengths, weaknesses and areas of concern. This will help you to develop an appropriate care plan and choose an appropriate living arrangement.

Another issue to consider is that your loved one should officially appoint someone to act as a Substitute Decision Maker (SDM) if the time comes that they cannot make their own medical decisions. That person should be identified in a written document such as Power of Attorney for Personal Care. This document should be on file with staff at the residence, and with other medical professionals that apply.



- Spoiled food that doesn't get thrown away
- Missing important appointments
- Unexplained bruising
- Difficulty getting up from a seated position
- Difficulty with walking, balance and mobility
- Uncertainty or confusion when performing once-familiar tasks
- Forgetfulness
- Poor personal hygiene
- House and yard neglected
- Stacks of unopened mail
- Late payment notices, bounced cheques
- Poor diet or weight loss
- Loss of interest in hobbies and activities
- Forgetting medications or taking incorrect dosages

# Important consideration for senior living

## Location

- Close to family
- Close to or in the same community

## Care

- Medical support & emergency response capabilities Onsite nursing staff 24 hours
- Staff qualification and attitude
- Availability of personalized wellness program and care plan onsite or regular visiting medical professionals

## Cost

- Public vs. private facility costs
- When, why and how often can fees change
- Life lease vs. lease options
- Is renter insurance required Self fund or require government assistance

## Does the facility address the Four Pillars of Health & Wellness:

- Movement
- Healthy eating
- Rest + recovery
- Mental wellbeing

## Other

- Well maintained
- Responsibilities of resident and of the facility
- Safety features
- Rights of residents
- Services included in monthly cost
- Communication with administration
- Visiting rules
- Social and recreational
- Access to transportation





# Care for the caregiver

When we feel depleted, we lose the ability to give. The caregiver role can become increasingly complex over time and may come at a time when work obligations and immediate family obligations compete for your time and attention. The feeling of wanting to help but of guilt for not doing more is very common with those caring for an elderly loved one. It is important to recognize that you are not on this journey alone. There are healthcare resources and a network of public and private healthcare programs available to you and your loved one. Community groups and friends and family can offer additional support.

It is also very important that you honestly assess your ability to provide care. There may be things that you are physically incapable of or there may be other personal obligations that restrict the time you can commit to caregiving. It is not a weakness to ask for help from medical professionals or community support.

Caregivers, through their actions, support and assistance, can have a very positive influence on the way their loved one ages. It goes without saying that a happy, healthy caregiver will have a much more positive influence on everyone in their lives.

Please reach out for help if you need. The community and health care support programs available can make a world of difference to you and all your loves ones.



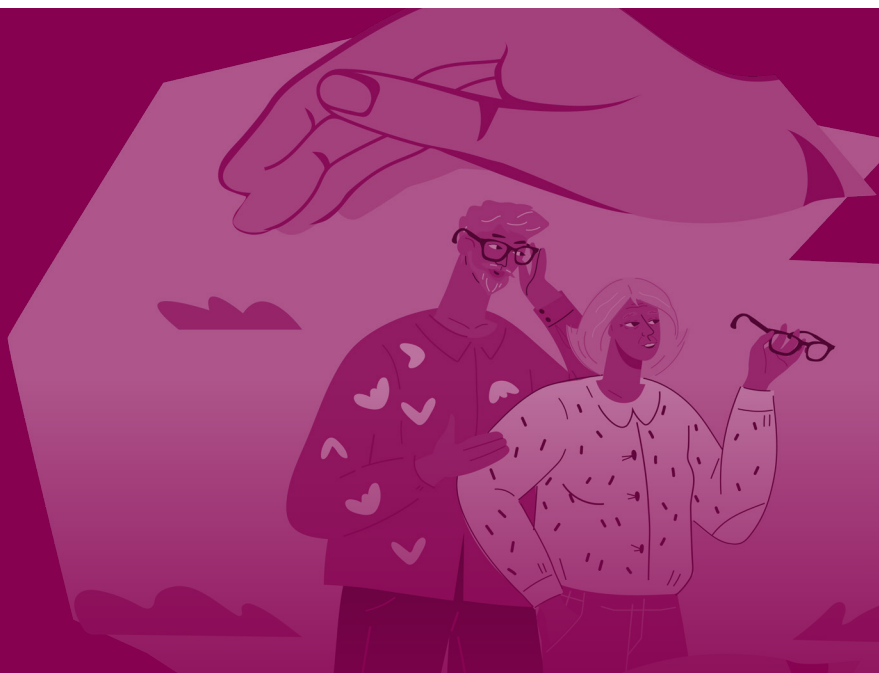
## The fatigue barometer

Sign of fatigue	Rarely	Sometimes	Often	Most of the time
I have difficulty falling asleep or I wake up often during the night	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I wake up tired and lack energy to get through the day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I've lost my appetite, or I eat too much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am out-of-sorts or sick more often than before (flu, cold, headache)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel irritable and impatient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I do a lot, but at the same time feel guilty for not doing more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have trouble concentrating (to do lists, paying bills, reading etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I've given up on activities that I enjoy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I no longer have much contact with anyone but the person I'm caring for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel sad and discouraged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am taking more medications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am anxious about the condition of my loved one and am anxious about their future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel like quitting everything	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





We're here  
to help.



Brian McKenzie, MBA, CIM  
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Krystina Meunier  
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