



### DID YOU KNOW?

**Accountable Aging's team is growing!** We've added two nurses with diverse work experience. **Diane Hayes** is serving clients in Dallas and **Mary Cooper** in Austin.

As a RN for 26 years, **Diane's** worked in diverse settings -- discharge planning, acute care, care coordination and hospice and home health. She received her *BSN* from the *University of Michigan*, is licensed by the *Texas Board of Examiners* as a RN and a new member of the *National Association of Professional Geriatric Care Managers*.

Drawing on varied experience, **Diane's** great at assessing client and family needs across a broad range of circumstances and conditions found in the aging population.

**Mary** has clinical experience in a variety of settings--hospital nursing in acute and intensive care, hospice, and home health care. She was an RN in the intensive care unit of a burn treatment facility in New Jersey and one of the largest in the U.S.

Mary received her *BSN* from *Pennsylvania State University* and is licensed by the *Texas Board of Nurse Examiners*. Her compassion for the elderly and disabled and their need for independence and her empathy for family concerns, allows her to use her nursing skills to assist clients in making smart, healthy and safe decisions for their future.

Welcome to the Accountable Aging Newsletter, Issue 4.

Our aim is to serve you as a trusted conduit of information from scientific and academic sources and highlight those services we offer that meet the needs of senior adults and their families.

This Newsletter Edition is devoted to:

The importance of organizing and sharing a senior's critical household and personal information to family outside the household

#### *True or False? (Answers in italics below)*

- 1) If one person knows how to pay the bills and manage the investments, we're covered?
- 2) Families generally know the last wishes of an elder?

#### ***Seniors should have important information written down, organized and shared with at least one other person!***

This ensures information won't be forgotten and avoids confusion since all parties will have easy access to key aspects of their household affairs. Otherwise, unexpected circumstances such as illness, incapacity or death may make it difficult for the family to pay bills, manage assets and file a life insurance claim.

#### **What the senior and back-up partner should determine ...**

##### Who are the key financial people?

Provide contact information for key people: financial advisor, tax return preparer, attorney and employer. Many employee benefits have financial implications, including medical, disability, life insurance, and retirement or pension plans.

##### What are the key accounts?

Start with your checking and savings accounts. List investments, insurance, and retirement accounts. Include debts such as credit cards, loans, and mortgages.

##### Where are the important documents?

Make a list of important documents--wills, trusts, durable power of attorney, medical power of attorney, living will, and directive regarding who may receive medical information. Where these documents are filed should be shared.

##### When should the senior meet with the back-up partner?

It's not sufficient to have a one-time conversation. Things change over time. Records should be updated regularly (at least once or twice a year.)

**Where should important documents be stored?**

Original documents that are difficult to replace should be stored in a safe deposit box. Keep copies at home so the information is handy, along with medical directives. The safe deposit box must be titled in more than one name; a spouse and/or executor should be a signatory on the safe deposit box.

This information was provided by Amy Praskac, one of the many resources available to clients and families of Accountable Aging, Inc.

**About Amy Praskac and *On the Record* ... [www.OnTheRecordOrganizing.com](http://www.OnTheRecordOrganizing.com)**

Amy was unexpectedly widowed in 2003 and became executor of her late husband's estate. Realizing how complicated life had become, she developed a recordkeeping system to help families have easy access to their senior's key personal information. Amy's a graduate of the *LBJ School of Public Affairs* at *The University of Texas* at Austin.

**Announcement**

Two members of the *Accountable Aging* team, Mick Koffend and Deb Roush, will conduct a workshop, *Mitigating the Quality and Safety Risks of Care Transitions*, at the *American Society on Aging National Conference* in Washington, DC on March 27<sup>th</sup>. We're excited to be nationally acknowledged.

**Do you know someone who might benefit from our services?**

If so, please forward this to them. They can sign up for our **free** newsletter at [www.accountableaging.com](http://www.accountableaging.com). Thanks.

**ACCOUNTABLE AGING, INC.**

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**Accountable Aging** is a single source for seniors and their families to attain knowledge, resources and on-going assistance with the challenges related to aging or caring for an elder loved one. We serve seniors in Austin, Dallas, San Antonio and the surrounding areas.

**For more information, contact us:**

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