



Initial Dementia Planning Checklist

For Tennesseans & Their Families

If your family is affected by a dementia diagnosis, you are not alone. Dementia is the designated term for a variety of cognitive disorders ranging from Alzheimer's, to Sundowners, to Parkinson's, and Lewy Body syndrome. Dementia affects millions of Americans and is only projected to significantly increase in the coming decades. Currently, **7 million Americans are living with some form of dementia.** That is one in ten people over age 65. The number of cases is expected to grow to 13 million in the next 25 years. It is best to be aware and prepared.

It's my hope that this checklist will serve as an initial outline of the important steps you and your loved one need to take following such a diagnosis. If you want to discuss further or move forward with planning, contact me to schedule a strategy session today at (423) 596-7220 or hello@nancycogar.com. Also, make sure to follow the [Boomer Time with Nancy Cogar podcast](#) so you won't miss future episodes.

I'm working hard to advocate for you and your loved one.

Nancy A. Cogar, Esq.



Initial Dementia Planning Checklist

When dementia changes everything, having a plan makes all the difference. Use this checklist to help protect your loved one's health, safety, finances - and your own peace of mind.

1. LEGAL DOCUMENTS TO COMPLETE ASAP

- Durable Power of Attorney (for finances)
- Health Care Power of Attorney (for medical decisions)
- Living Will (end-of-life care wishes)
- HIPAA Authorization (permission for doctors to share info with your agents)
- Last Will & Testament (if not already done)
- Review or create a Trust (if appropriate) Trusts help in avoiding a future probate.
- List of important contacts: doctors, lawyer, financial advisor

Make sure your financial advisor is included in any estate planning so that they are aware of changes to the titling of assets and can advise as to the assets themselves.

2. SAFETY ASSESSMENT INSIDE & OUTSIDE THE HOME

- Install door alarms or chimes to prevent wandering
- Consider a GPS tracking bracelet or medical alert ID
- Lock up hazardous items (cleaners, tools, sharp objects, meds)
- Declutter floors to prevent falls
- Install grab bars in bathrooms & non-slip mats
- Check smoke detectors and stove safety features
- Plan for safe driving - talk about giving up the car keys

3. CONNECT WITH CAREGIVER SUPPORT & RESOURCES

- Find local Adult Day Programs for daytime care and activities
- Research Respite Care options for temporary relief
- Join a dementia caregiver support group (local or online)
- Contact your local Area Agency on Aging for local services
- Look into financial help: Medicaid waivers, veterans' benefits, or long-term care insurance
- Make a list of family/friends willing to help - don't be afraid to ask

4. OTHER HELPFUL STEPS AND RESOURCES

- Organize medical records and keep them up to date
- Make a medication list and review it with the doctor

Additional resources and help is available with the following agencies:

Southeast Tennessee Area Agency on Aging and Disability
866-836-6678 or local at (423) 424-4256

TennCare CHOICES program
You can contact the LTSS Help Desk at 1-877-224-0219

Alzheimer's Association of Tennessee
(423) 265-3600

