



THE JOHNSON LEGACY REPORT

Building Trust for Generations



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CARE PLANNING WITH AGING PARENTS

Over the years we have had conversations with numerous clients about their aging parents and the issues surrounding this major life transition. This is a difficult transition for the parent who realizes they are entering a new, less independent phase of their life and it's difficult for you (the adult child) to have open discussions and in many cases an increased role as caregiver.

We thought you might find it useful to read an article about important conversations to have with your parents to find out how and where they want to be cared for. It can be hard to find the right words sometimes as the adult child of aging parents. You may be afraid to tell them the truth about a situation, you may be just hoping they have a plan, family dynamics can get in the way, or, maybe your strong-willed parent is having none of it!

Transitions, like helping with more daily activities (e.g., bathing, dressing) or moving to long-term care, bring on many emotions and role changes for everyone.

Conversations should help people make decisions for themselves instead of the system making them for you, or having someone suffer needlessly. Here are some examples to help you start talking.

HOME ENVIRONMENT

"Where do you want to live as you get older? Have you thought about staying at home, or other locations? I have a friend at work who is planning for the future and it made me wonder about your plans."

"If you decide to stay here, let's talk about how we can make this happen. Are there neighbours who can help? Do you have all the facilities or services you may need nearby?"

"Tell me what crosses your mind when you think about moving somewhere else."

ACCEPTING MORE CARE

"Have you thought about what is important to you related to care that could help you at this time in your life?"

"Are there specific things that you would like help with?"

"We should find out the cost of some of the care options we have discussed and see what is possible."

MOVING AND/OR DOWNSIZING

"Do you think you are going to be able to maintain this house by yourself in the next few years?"

"My goal is to help you maintain your independence and freedom; and sometimes a move actually increases people's freedom. I was talking to a friend of mine - her mother told her what relief it finally was to move into a retirement home and not have to worry about their big home."

"Let's start with looking at one room at a time. Tell me what things are most important to you, and what we might be able to give to a relative or friend."





HOME SAFETY

"Are you worried about your comfort and safety? Can you tell me about some things that could be done to make things easier for you?"

"Is there anything in the house that makes you worry that you might fall or hurt yourself? Let's take a look around."

BATHING

"Are my visits each Sunday a good time to help you bathe?"

"I am here to help you manage on your own. I will only help you with the areas you find difficult to do by yourself."

END OF LIFE DISCUSSIONS

"What are the most important things that you want your family, friends, and/or doctors to understand about your wishes for end-of-life care?"

"What kind of care would you want - or not want - to receive if you were not capable of deciding for yourself? Who would you want to make decisions for you if you weren't able to?"

"I was thinking about what happened to _____, and it made me realize..."

"Are there important milestones you'd like to meet if possible?" (e.g., your daughter's wedding, birth of a grandchild, a birthday or anniversary.)

BANKING, FINANCIAL AND LEGAL DOCUMENTS

"It would bring me a lot of peace of mind if I knew I had the information I needed in case of an emergency."

"Dad, you taught me to be responsible my whole life. Let's work together to ensure you have all your necessary documents organized."

"I was discussing my plans for retirement with my financial advisor and it got me thinking about your finances. How do you feel about talking over the details of your financial plan just in case something happened to you? I have heard some bad stories about families who had trouble finding important information during a crisis."

Source:

<https://www.saintelizabeth.com/Caring-for-Family/Caregiving-Information/Preparing-to-be-a-Caregiver/Caregiver-Tips-Talking-to-Aging-Parents.aspx>

Market Pulse:

Major Stock Indexes	Level/Price	YTD Return Ending Jan 31/18
S&P/TSX Comp	15,952	-1.59%
S&P 500 Comp	2,824	5.62%
Dow Jones Industrial Avg	26,149	5.79%
Major Bond Index		
FTSE Universe	1,028	-0.80%
Commodities		
Crude Oil - WTI (US\$/bbl)	\$65.17	7.86%
Gold (US\$/oz.)	\$1,338	2.16%
N. Gas (US\$/MMBtu)	\$2.93	-0.64%
Currency		
Canadian Dollar (CAD/USD)	\$0.81	1.99%

Source: Bloomberg.





Personal Updates:

Lori is still working on strengthening her leg from the ski accident last year so she is not skiing this season. She is spending her time doing controlled exercises, yoga, some spin and lots of massage. The healing project continues! Lori has been hitting the movie theatre weekly to make sure she is well equipped for the Oscars, it's a great way to spend some time on the cold dreary days of January. Lori also managed to squeeze in a fun-filled weekend with friends in Calgary when their weather was good.

Jay and the family had an incredible time up at Big White at the end of January. They were joined by Brianne's Hammers & Heels business partner, Sheree, and her family. Next up at the end of February is a weekend trip to Vancouver for Charley's first ever cheerleading competition. In the meantime, Jay has already started training for his first mountain bike race in Salmon Arm on May 13.

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