



Worksheet – Amarillo Estate Planning Council 2024

Six Grief Triggers

1. Relationship
2. Material
3. Role
4. Function
5. Intra-psychic
6. Systemic/assumptive

#1 need of grieving people –

A bad question to ask and what to ask instead

A common but unhelpful thing to say

Several good questions to ask

What to focus on at post-death services

Another common but unhelpful thing to say

Losses and gains

The “rush to comfort” upon diagnosis with illness

A hospital care package

Don’t go away

Statistics

Age-related forgetfulness

Non-dementia causes

MCI

Dementia – Severe loss of thinking, memory, reasoning, and physical skills such that a person’s ability to carry out the normal ADLs is compromised and eventually destroyed.

The most common cause and other causes

Treatment?

First signs occur 10 – 20 years pre-diagnosis

Memory is LIFO

Personality

Visual/spatial issues

Language and words

Social withdrawal

Ten signs of progression

1. Memory loss that disrupts daily living
2. Repeating without awareness
3. Increasing problems with words in speaking/writing
4. Becoming lost in familiar places
5. Unable to plan, solve problems, or make good judgments
6. Difficulty completing familiar tasks
7. Disorientation about time, people, places
8. Noticeable change in mood and personality
9. Neglecting person hygiene, appearance, and nutrition
10. Neglecting personal safety; loss of balance

Action Steps AHEAD of time

1. NIH booklet – *Understanding Memory Loss* –
order.nia.nih.gov/sites/default/files/2018-02/Understanding-Memory-Loss.pdf
2. Memo for Client Protection and Control
3. Complete documents – especially:
 - a. Living will/Five Wishes
 - b. Power of Attorney for Healthcare and Finance
 - c. Insurance, including LTC
4. Document everything

When you have suspicions:

1. Talk to the client and encourage evaluation
2. Involve others, including compliance
3. If diagnosed, provide additional resources
 - a. Alzheimer’s Association – www.alz.org
 - b. *The 36-Hour Day*, book by Nancy Mace and Peter Rabin
 - c. NIH booklet, *Caring for a Person with Alzheimer’s* –
<https://order.nia.nih.gov/publication/caring-for-a-person-with-alzheimers-disease-your-easy-to-use-guide>
4. As necessary, transition to working with POA and Successor trustees

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Thank you!

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