



# LONG-TERM CARE PLANNING CHECKLIST

Whether it's for you or a loved one, it's important to begin with the basics when developing your long-term care plan. This checklist can help you get started.

## YOU CAN'T PREDICT THE FUTURE, BUT YOU CAN PREPARE FOR IT.

### EVALUATE CARE OPTIONS

- Consider services you may need
- Visit facilities online or in person
- Review costs (current and future)
- Ask for recommendations

### DETERMINE COVERAGE OPTIONS

- Self-funding
- Long-term care insurance
- VA benefits
- Medicare/Medicaid

### CONSULT PROFESSIONALS

- Your AWM&T Relationship Manager
- Long-term care insurance agent
- Estate attorney
- Your medical team

### GATHER IMPORTANT DOCUMENTS

- Estate plan
- List of all financial accounts
- Legal documents
- Health and military records



Be sure to document all of your wishes and update them if your situation changes. Then, be sure to **talk with your loved ones about your plans.**



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