



FREE GUIDE FOR FAMILY CAREGIVERS

The *Conversation Guide for Caregivers*

Step-by-step scripts and a structured resource for caregivers to open meaningful conversations with aging loved ones — covering daily life, long-term planning, and end-of-life wishes to help you communicate with confidence.

HOW TO USE THIS GUIDE

Work through each section during separate, relaxed conversations. It is not meant to cover all of the topics at one time. Some conversations may seem redundant, but the object is to learn more information about your loved one with every conversation

Use the checkboxes to track topics you've covered together. Approach every question with curiosity, not urgency. The goal is to understand their values and wishes, not to solve problems in a single sitting.

HOME & LIVING ENVIRONMENT

5 Topics

☐ **Do you feel safe and comfortable in your current home?**

Explore fall risks, accessibility, stairs, lighting, and bathroom safety.

☐ **Is managing the home — cleaning, repairs, yard work — becoming difficult?**

Identify tasks needing support vs. those they want to keep doing independently.

☐ **Would you consider modifying your home to make it easier to navigate?**

Grab bars, ramps, stair lifts, walk-in showers.

☐ **How important is it to you to stay in your own home as you age?**

Gauge attachment to current home vs. openness to alternatives.

☐ **Are there neighbors, friends, or community members nearby who check in on you?**

Note names and numbers of people who can assist and the type of support they can provide.

NUTRITION & MEALS

4 Topics

☐ **Are you eating regular, nutritious meals each day?**

Watch for unintentional weight loss or skipping meals.

☐ **Is grocery shopping or cooking becoming a challenge?**

Decision-making and mobility can become more difficult with age. Creating simple meal plans or having prepared meals available may be an option.

☐ **Do you have any dietary restrictions or preferences we should know about?**

Note their food preferences that are well-tolerated and liked. Having their favorite foods available may encourage eating.

☐ **Would you be open to meal delivery services or help with cooking?**

Delivery of prepared foods that are easy to heat up may provide necessary nutrition.

HEALTH & MEDICATIONS

4 Topics

☐ **Are you able to manage all your medications on your own?**

Dosages, refills, and remembering to take medications on time.

☐ **Are you keeping up with doctor appointments? Do you need help getting to them?**

Phone reminders and shared calendars can assist with this. There are transportation services that will take individuals to medical appointments.

☐ **Are there any health concerns you've been putting off talking about?**

Fear and denial may cause a delay in discussing concerns.

☐ **How is your vision, hearing, and mobility these days?**

These issues have a significant affect on daily independence. Observation may be the best way to detect decline in these areas.

“Being deeply loved by someone gives you strength, while loving someone deeply gives you courage.”

— Lao Tzu

TRANSPORTATION & MOBILITY

4 Topics

- ☐ **How comfortable do you feel driving? Has anything changed recently?**
This can be a sensitive topic. Approach it with care and curiosity, not judgment.
- ☐ **If you were unable to drive, how would you get where you need to go?**
Identify tasks that need support vs. those they can still do independently.
- ☐ **Are you able to get out of the house as much as you'd like?**
The importance of social interactions varies with each person. Some value social engagement while others find it overstimulating.
- ☐ **Are there any mobility aids (cane, walker, wheelchair) that might make things easier?**
In some cases, your Doctor can prescribe DME (durable medical equipment), but not all are covered by insurance. There are many assistive devices available. See the list of recommended items on our website.

SOCIAL CONNECTION & MENTAL WELLNESS

- ☐ **Do you feel lonely or isolated at times?**
Social isolation is a significant health risk for older adults.
- ☐ **What activities, hobbies, or social groups bring you joy right now?**
Local senior centers can provide an option for more engagement. Contact the local Department of Aging & Adult Services.
- ☐ **How is your mood and mental health overall? Do you ever feel anxious or depressed?**
Watch for changing moods and ask for updates from those who spend more time around the loved one.
- ☐ **Is your faith community, spiritual practice, or sense of purpose still a part of your life?**
Having a purpose keeps the mind more active and enhances one's quality of life.

SAFETY & PERSONAL CARE

- ☐ **Have you had any falls or close calls recently?**
Who do you notify if there is an emergency? Do they have a medical alert button or notification device?
- ☐ **Are you comfortable managing personal hygiene and grooming on your own?**
Bathing, dressing, toileting — ask gently and without judgment. Watch for changes in grooming.
- ☐ **Do you feel safe from scams, fraud, or people taking advantage of you?**
Provide education on phishing scams and fraud. Encourage financial transactions to be reviewed before completion.
- ☐ **Would you be open to a medical alert system or regular check-in calls?**
Cameras in the home are an option for more frequent check-ins.

A good laugh and a long sleep are the two best cures for anything.
— Irish proverb

LIVING ARRANGEMENTS AS NEEDS CHANGE

5 Topics

- ☐ **If you needed more help day-to-day, where would you want to live?**
Own home, with family, assisted living, memory care — explore all options openly.
- ☐ **How do you feel about in-home care — having a professional caregiver come to you?**
Identify tasks needing support vs. those they want to keep doing independently.
- ☐ **Have you ever visited or considered assisted living centers?**
Touring facilities can be useful for family and loved ones. Knowing what options are available before an emergent need arises.
- ☐ **Would you be open to moving in with family if care needs increased?**
Gauge willingness to change the living situation as needs progress. Consider financial implications when reviewing options.

FINANCES & LEGAL PREPAREDNESS

5 Topics

- ☐ **Do you have a will or trust in place, and is it up to date?**
If one owns a home, a trust is ideal. Consult with an elder care attorney for long-term planning and protecting assets. Ensure the beneficiaries are updated and accurate.
- ☐ **Have you designated a durable power of attorney for finances?**
Who can manage finances if they cannot? Financial abuse is very common among the elderly. Having a trusted person or fiduciary with oversight protects everyone.
- ☐ **Do you have long-term care insurance, and do you know what it covers?**
Insurance brokers can be very helpful in understanding options and gap plans for Medicare. Shop around as many brokers only offer certain plans that may not meet your needs. Be sure to ask about prescription drug coverage.
- ☐ **Where are all the financial accounts, documents, or passwords?**
Keep a secure record — not for control, but for emergencies. A system like the NOK Box (Next of Kin) can be helpful in organizing important documents
- ☐ **Do you feel financially secure for the future? Are there any money concerns?**
Related to a durable power of attorney, is there a financial advisor or accountant that knows the situation?

COGNITIVE HEALTH & MEMORY

4 Topics

- ☐ **Have you noticed any changes in your memory or thinking that concern you?**
Normalize this conversation — early awareness matters.
- ☐ **If your memory were to decline significantly, who would you trust to make decisions for you?**
A Power of Attorney for healthcare and financial decisions should be designated and on file with your providers. They do not need to be the same person.
- ☐ **Have you discussed cognitive health screening with your doctor?**
Having a baseline screening and then regular testing can identify cognitive declines sooner. Worsening vision or hearing are often contributing factors.
- ☐ **What does a good quality of life look like to you, even if memory declines?**
What are their wishes if their memory declines.

Our value lies in what we are... not in our ability to recite the recent past.

– Homer

ADVANCE DIRECTIVES & MEDICAL DECISIONS

5 Topics

- ☐ **Do you have an Advance Directive or Living Will in place?**
Document their wishes for medical care for when they may not be able to speak for themselves.
- ☐ **Have you designated a healthcare proxy or durable power of attorney for healthcare?**
These documents need to be signed with a notary. Copies should be given to your Healthcare Provider for upload into your Medical Record.
- ☐ **How do you feel about life-sustaining treatments — ventilators, feeding tubes, CPR?**
Explore their specific values around quality vs. quantity of life. Five Wishes is a free Advance Directive that is easy to read and understand. www.fivewishes.org
- ☐ **Have you considered or completed a POLST/MOLST form with your doctor?**
A physician's order that travels with them across care settings.
- ☐ **Under what circumstances would you want medical intervention stopped?**
Try to be as specific as possible. Having this in writing can provide great comfort to family members who have to make the decisions.

COMFORT CARE & HOSPICE

- ☐ **Do you know what hospice or palliative care is, and how do you feel about it?**
Hospice focuses on comfort and improving the quality of life for the time that remains. The agency will bring medical equipment to your home and have your medications delivered. Palliative care focuses on pain and symptom management. This is for those who have a chronic illness and are still seeking treatment.
- ☐ **Where would you want to be at the end of life?**
Do you want to be at home, in a hospice facility, other care center or hospital?
- ☐ **Who do you want by your side at the end of your life?**
Are there certain family members, clergy, other friends?
- ☐ **Are there treatments or interventions you would absolutely refuse, no matter what?**
Your POLST and Advanced Directives should also have this information. Consider if you want to be kept alive and under what circumstances.

VALUES, MEANING & WHAT MATTERS MOST

- ☐ **What does a good death mean to you?**
One of the most powerful questions you can ask.
- ☐ **What are your greatest fears about dying or the process of dying?**
If they are resistant to this type of conversation, it can be helpful to discuss it from a third party, such as discussing a friend who is ill or elderly or using a TV show scenario.
- ☐ **Are there spiritual, religious, or cultural traditions that should guide your care?**
This should also be addressed in POLST and Advanced directives.
- ☐ **Are there any unresolved issues that need to be addressed? Regrets, relationships, conversations?**
How can we support you in finding closure?

Every survival kit should include a sense of humor.
– Unknown

LEGACY, FUNERAL & PRACTICAL ARRANGEMENTS

5 Topics

- ☐ **Have you documented your wishes for burial, cremation, or other arrangements?**
Prepaid funeral arrangements are cheaper and can be paid for over time, whereas “at need” services must be paid in full. There are insurance plans that will grow over time to cover increasing costs.
- ☐ **Do you have preferences for a funeral, memorial service, or celebration of life?**
Knowing your loved ones’ preferences can relieve pressure from grieving loved ones.
- ☐ **Are there specific belongings, keepsakes, or gifts you want to go to specific people?**
Keeping a list as part of your will and trust planning and labeling items is the best way to ensure the person you desire gets what you want.
- ☐ **Is there a legacy — a story, a letter, a lesson — you want to leave behind?**
See our resources for a sample Legacy letter. Sites like Romento.co allow loved ones to answer questions and leave videos.
- ☐ **Do we know where to find your important documents — will, insurance, deed, passwords?**
Your wishes, even written down, don’t matter if they cannot be found. Systems like NOK box can be useful in getting organized.

"Life is a great sunrise. I do not see why death should not be an even greater one."

– Vladimir Nabokov