



# Complement Your Client's Legal Planning with a Personal End-of-Life Plan

Help people align their legal  
documents and final wishes



# Give families the right information at the right time — to help them plan and prepare instead of react and regret

## Get tools to help your clients:

- Develop and share an end-of-life plan
- Start difficult conversations with family members
- Prepare for a hospital stay
- Create a legacy project their family will treasure



## There's a lot to manage

Toward the end of life, families have many questions — even when there are multiple legal documents in place. For example:

- Is the named executor or trustee still available?
- Are all family members aware of what's planned?
- Who can access the individual's financial accounts to pay for care if the person is unable to communicate?
- Who will handle health care coordination?
- Who will provide day-to-day care or organize a move to assisted living or a nursing home?





## Help your clients create a personal end-of-life plan

Many people make legal plans to prepare for their future. But few consider how they'll manage the health crises that occur later in life or plan for their final days and moments. And often, they don't consider how they want family members to remember them.

Near the end of life, a hospital visit is almost inevitable. When families know what to expect and are prepared to manage the hospital environment, they're better equipped to face the difficult care decisions they may need to make with or for a loved one.

Learn how to help your clients complete **My Peace and Comfort Plan™** to understand and plan for situations that often arise near the end of life.

## Or refer clients to Dr. Sarah Todd for one-to-one support

Caregiving Pathways emergency medicine physician Sarah Todd helps families evaluate their care goals, values, fears, and preferences. Then she explains the options for end-of-life care and their impact. Having this information helps people decide in advance which types of interventions they do and don't want in a medical emergency.

## Give families peace of mind

It's helpful to develop and share an end-of-life plan in advance. Having a plan helps families avoid conflicts about how to handle details. Instead, each family member can fully focus on caring for a loved one — according to his or her wishes — during the final days.

Few people talk with family members about what they want to leave as their personal legacy. Creating a legacy project can help people be remembered for what was important to them. Examples are a scrapbook of favorite memories or a letter or video for each family member sharing what that person has meant to the individual.

The time to address these sensitive topics is before a health crisis occurs. During a period of great emotional stress, the less people need to focus on making decisions, the more they can help a loved one through the final days with peace of mind for everyone.

# Everything you need is in one simple package from Caregiving Pathways

## To engage clients:

- Content to send to clients by mail or email; telephone scripting
- Flyers explaining why developing and sharing an end-of-life plan is important
  - One version for your clients
  - Another version for family caregivers of clients who have challenges that affect their legal and financial management abilities

## To help clients develop an end-of-life plan:

- Detailed planning guide
- Plan template
- Guide to managing a hospital stay
- List of resources for more information about family caregiving

## To help you learn more about developing a personal end-of-life plan:

- A two-hour live training in-person or online
- Ongoing videoconference or phone support

## To give you a supply of printed materials to distribute to clients:

- Twenty-five sets of communications:
  - Flyers
  - Planning guides
  - Plan templates
  - Hospital guides
  - Resources lists

## To learn more, contact Caregiving Pathways:

Beth Suereth at **[beth.suereth@caregivingpathways.com](mailto:beth.suereth@caregivingpathways.com)** or **508.681.5091**

Dr. Sarah Todd at **[dr.sarah.todd@caregivingpathways.com](mailto:dr.sarah.todd@caregivingpathways.com)** or **508.524.7543**

**Differentiate your organization and  
enrich your professional life.**

**Help your clients develop a personal end-of-life plan  
that dovetails with their legal planning.**

**Or refer your clients to us. Our physician partner,  
Dr. Sarah Todd, works with people one to one to develop  
their personalized **My Peace and Comfort Plan™**.**

**Contact us to learn more.**

Family Caregiving Partner Beth Suereth:

**[beth.suereth@caregivingpathways.com](mailto:beth.suereth@caregivingpathways.com) or call 508-681-5091**

Physician Partner Sarah Todd:

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