

Long-Term Care Planning Conversation Worksheet

A guided tool to help parents and adult children discuss long-term care needs with clarity and compassion.

How to Use This Worksheet

Use the prompts below to have an open and honest conversation with your loved ones about long-term care preferences. Each section includes space to take notes and record specific wishes or decisions. These discussions may feel difficult, but planning ahead ensures everyone is on the same page when support is needed.

Living Arrangements & Home Safety

Where do you want to live if daily tasks become difficult?
(Stay at home with help? Downsize? Move near family? Assisted living?)

Notes/Plan:

If you stay in your current home, what modifications might be needed?
(Grab bars, ramps, stair lifts, widened doors, emergency alert system, etc.)

Notes/Plan:

Daily Support & In-Home Care

If you begin needing help with daily activities (bathing, dressing, cooking), what kind of care would you prefer? (Family help, hired caregiver, care manager, adult day program?)

Notes/Plan:

Would you be comfortable with in-home care services, and how often?
(Daily visits? A few hours a week? Overnight care?)

Notes/Plan:

Medical Care & Decision-Making

Who should make decisions if you're unable to communicate your wishes?
(Have you named a healthcare proxy or filled out an advance directive?)

Notes/Plan:

Are there any specific medical treatments or interventions you'd want—or not want—in serious illness? (Hospitalization, feeding tubes, resuscitation, ventilator use)

Notes/Plan:

Memory Loss & Cognitive Decline

If memory issues arise, what would you want your care to look like?
(Stay home with supervision, transition to memory care community, daily check-ins)

Notes/Plan:

Who should be notified or involved in decision-making if memory loss becomes significant?

Notes/Plan:

Mobility & Personal Dignity

If mobility becomes limited or if help is needed with personal care (toileting, dressing), what support feels most respectful to you?

Notes/Plan:

Are there particular preferences around who helps with personal care (e.g., same gender caregiver, family vs. professional)?

Notes/Plan:

Financial Planning for Care

Have you planned financially for the cost of long-term care?
(Do you have long-term care insurance, savings, or a preferred payment method?)

Notes/Plan:

Who should handle financial matters if you're no longer able to?
(Have you named a financial power of attorney?)

Notes/Plan:

Final Wishes & Peace of Mind

Have you shared your end-of-life preferences and wishes?
(Funeral plans, spiritual needs, legacy items, letters to loved ones?)

Notes/Plan:

What does quality of life mean to you as you age?

Notes/Plan:

This worksheet is meant to evolve. Revisit it regularly, and update your plan as your circumstances or preferences change. The more you discuss now, the easier it becomes to honor your wishes later.

Miscellaneous Notes
