



LM Services

Laura Dwelley, RN

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Health/Finance review

| | Y | N |
|---|---|---|
| Are you 65 or older? | | |
| Are you being treated for any medical conditions? | | |
| Do you have a Living Will? | | |
| Have you designated a Health Care Surrogate (HCS) & Power of Attorney (POA) | | |
| Are your HCS and POA the same person? | | |
| Are your HCS and POA healthy? | | |
| Do you have a local person to call in case of a fall or medical emergency? | | |
| Do you have a life alert system? | | |
| Are your bills on autopay or is there a written schedule? | | |
| Do you have pet(s)? | | |

Any answers in yellow boxes should be reviewed with a Care Manager, or a trusted legal or medical professional.