

SELECTING A GERIATRIC CARE MANAGER



A geriatric care manager, also known as an aging life care professional, is a specialist in the care of older adults who can guide and advocate for families caring for older relatives or disabled adults. The geriatric care manager can bring a wealth of resources to the family and help to address a wide variety of care issues. They often have backgrounds or specialized training in nursing, public health and social work. Some of the certifications and appropriate educational credentials include:

- BA - Bachelor of Arts
- BSN - Bachelor of Science in Nursing
- RN - Registered Nurse
- MPH - Master of Public Health
- C-ASWCM - Certified Advanced Social Work Case Manager
- CMC - Care Manager, Certified
- CHP-SW - Certified Hospice and Palliative Care Social Worker
- MSN - Master of Science in Nursing
- SW-G - Social Worker in Gerontology
- CCM - Certified Case Manager

Many people find it helpful to work with a life care professional in making decisions. Use this worksheet to help you determine which geriatric care manager is best for you and your family.

Use this worksheet to assist you in selecting a geriatric care manager.

Topics to Address:

Geriatric care manager profile

Evaluating a geriatric care manager

Scope of responsibilities

Memory care considerations

Costs

Release from liability: Any selections the individual or family makes in terms of care are the sole responsibility of the decision maker. The Financial Professional, Legg Mason, and The Center for Innovative Care in Aging at the Johns Hopkins University School of Nursing are held harmless and released from any liability that may occur from selecting an agency, care center, care manager, caregiver, community or facility.

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Geriatric care manager profile

Name of geriatric care manager

Date reviewed

Sponsoring organization

Phone number

Email address

Evaluating a geriatric care manager

Consider engaging a geriatric care manager in conversation around the questions suggested below. Listen for cues that demonstrate knowledge and experience, patience and tenacity, as well as the kindness you would like to see extended to your loved one.

How long have you served as a geriatric care manager?

Do you have a specific focus on aging and elder care?

Yes

No

Do you have experience dealing with care for people who have Alzheimer's disease, dementia or other cognitive impairments?

Yes

No

Do you have experience dealing with care for people with infectious diseases or viruses?

Yes

No

What is your educational background?

Do you have any special licenses or professional designations in gerontology, nursing or social work?

Yes

No

How many individuals and families have you worked with?

Which of your personal qualities make you well-suited to this line of work?

Have you worked with someone like my _____ who has the following issues/conditions?

Yes

No

What makes you uniquely qualified to help us?

Scope of responsibilities

When are your services typically sought? Can you please provide some specific examples?

Can you provide an example of a special challenge you've addressed for one of your clients?

Yes No

What are some examples of things you can do for older adults and their families that they could not do for themselves?

Have you coordinated local patient resources when families live far away from their parents?

Yes No

What processes are in place for communication and for staying in touch with me and my family?

After the initial assignment, how long do you typically stay involved?

How familiar are you with Medicare, Medicaid and private insurance coverage and limitations of the coverage?

Are you familiar with long-term care coverage and what is required for a policy to begin coverage?

Yes No

What is your availability and what role will you have during emergency situations?

Memory care considerations

What experience do you have working with people who have Alzheimer's disease, dementia or other cognitive impairments?

What are your qualifications/credentials?

Costs

Is there a fee for your initial assessment? If so, what is that fee?

Yes No

How do you charge for your services: by the hour, day or month?

Do you require a deposit? If so, how much?

After the initial assessment, are you able to assist with monitoring ongoing care?

How do you monitor that care, and will you report back directly to family members, as needed?

At Franklin Templeton, everything we do has a single focus: to deliver better client outcomes.

- We have deep expertise across equity, fixed income, alternatives, multi-asset solutions and cash strategies
 - We offer an unmatched range of specialist investment managers, consisting of more than 1,300 investment professionals
 - Over 70 years of experience in identifying opportunities and delivering investment solutions to clients.
-

Any information, statement or opinion set forth herein is general in nature, is not directed to or based on the financial situation or needs of any particular investor, and does not constitute, and should not be construed as, investment advice, forecast of future events, a guarantee of future results, or a recommendation with respect to any particular security or investment strategy or type of retirement account. Investors seeking financial advice regarding the appropriateness of investing in any securities or investment strategies should consult their financial professional.

All investments involve risk, including loss of principal.

Franklin Resources, Inc., its affiliates, and its employees are not in the business of providing tax or legal advice to taxpayers. These materials and any tax-related statements are not intended or written to be used, and cannot be used or relied upon, by any such taxpayer for the purpose of avoiding tax penalties or complying with any applicable tax laws or regulations. Tax-related statements, if any, may have been written in connection with the "promotion or marketing" of the transaction(s) or matter(s) addressed by these materials, to the extent allowed by applicable law. Any such taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor.