



Health crises almost always lead to financial crises
and inevitably to spiritual crises.

BRIDGEPATHS EQUIPS CAREGIVERS TO PROVIDE PREVENTATIVE & MAINTENANCE CARE

Are you aware of what it takes to be a caregiver?

Are you ready to take on the role and responsibilities as a caregiver?

Are you prepared for the results of your caregiving?

Are you ready to manage the home-health care of a loved one?

FINANCIAL PLANNING & ASSISTANCE

Are you ready to manage the financial decisions, cash flow and insurance coverage of a loved one?

Are you aware of the six areas of comprehensive financial planning all money decision makers should know?

CARE COMMUNICATION SYSTEM

Are you ready to be the care recipient's spokesperson and represent their thoughts, emotions and perspectives in a crisis?

NETWORK OF CARE RESOURCES

Are you the "connector" who initiates and follows up with caregiving activities?

Are you comfortable collaborating with a network of professionals, non-professionals, volunteers and loved ones for trusted care, advice and compassion?

Are you willing to adapt your activities to take on additional tasks?



First Name:			
Email Address:			
Please return the assessment tool to	jake@bridgepaths.com		
Upon receipt you will receive an objective report to help you improve in low readiness areas.			
Caregiver Awareness			
Caregiver Accessibility	Task	Yes	No
	Can I keep the schedule of treatment appointments and doctor visits for the care receiver?		
	Do I know how to organize and manage my care receiver records, reports and communications?		
Caregiver Financial Position	Task	Yes	No
	Am I ready to make decisions about cash flow, debt, out of pocket medical expenses, and budget?		
	Do I know how to address estate, power of attorney and executor tasks for my care receiver and/or family?		
Caregiver Personal Health	Task	Yes	No
	Am I ready to manage my sadness, sorrow, fatigue and discouragement?		
	Am I ready to be patient, understanding, forgiving and gracious in the midst of workplace stress?		
Caregiver Communications	Task	Yes	No
	Am I ready to discuss difficult financial responsibility and accountability issues?		
	Can I build a trusting relationship with family members?		
Small Business Owner Caregiver Awareness			
SBO Caregiver Accessibility	Task	Yes	No
	Do I have the skill to manage the issues that caregivers/receivers bring to the workplace?		
	Can I adjust staffing capacity and production levels to offset the gaps caused by caregiver/receiver inabilities to perform at a high level?		
SBO Caregiver Financial Position	Task	Yes	No
	Am I able to make decisions about my moral obligations to keep them on the payroll for my caregiver/receiver?		
	Do I have the knowledge to address short-term and long-term disability issues with my care receiver and FMLA with my caregiver?		
SBO Caregiver Emotional Physical and Spiritual Health	Task	Yes	No
	Am I ready to seek help so I can respond to my stressful situations as a Small Business Owner?		
	Am I able to be patient, understanding, forgiving and gracious in the midst of workplace stress?		
SBO Caregiver Communications	Task	Yes	No
	Am I able to have the awkward conversations about chronic or terminal illness issues with my caregiver/receiver employees?		
	Am I ready to discuss difficult financial responsibility and accountability issues?		
Go to : www.bridgepaths.com for full Awareness Assessment Guide			

BRIDGEPATHS IS ALL ABOUT EQUIPPING YOU TO BE THE BEST CAREGIVER TO YOUR LOVED ONES!

Caregiver Readiness				
Caregiver Accessibility	Task	Capability	Motivation	Commitment
	What is my readiness to remove barriers that prevent the care receiver from having access to me during their time of need?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to assist my care receiver in understanding the medical tests, treatments and reports?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
Caregiver Financial Position	Task	Capability	Motivation	Commitment
	What is my readiness to manage wills and advanced directives for my care receiver and/or family?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to adjust cash flow and budgets to maintain financial stability?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
Caregiver Personal Health	Task	Capability	Motivation	Commitment
	What is my readiness to seek help to respond to my stressful situations as a caregiver?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to address spiritual concerns about death, suffering, shame and guilt?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
Caregiver Communications	Task	Capability	Motivation	Commitment
	What is my readiness to participate in awkward conversations about end of life issues?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to dialogue with compassion, objectivity and empathy?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
SBO Caregiver Readiness				
SBO Caregiver Accessibility	Task	Capability	Motivation	Commitment
	What is my readiness to manage adjustments to the daily schedule of my caregiver/receiver?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to manage the issues that caregivers/receivers bring to the workplace?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
SBO Caregiver Financial Position	Task	Capability	Motivation	Commitment
	What is my readiness to provide financial assistance to the caregiver/receiver?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to make decisions about my moral obligations to keep them on the payroll for my caregiver/receiver?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
SBO Caregiver Emotional Physical and Spiritual Health	Task	Capability	Motivation	Commitment
	What is my readiness to manage my emotions on a daily basis?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to address spiritual concerns about death, suffering, shame and guilt?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
SBO Caregiver Communications	Task	Capability	Motivation	Commitment
	What is my readiness to be clear and simple when addressing a difficult issue?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)
	What is my readiness to share difficult/bad news?	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)	Rate 1-2-3-4 (Low-High)

Next Steps & People

Improving Capability- Next Steps	Improving Motivation- Next Steps	Improving Commitment- Next Steps
Meet with the social worker or medical staff to better understand the medical tests, treatments and reports.	Set time to discuss how best to organize a process for care receiver records, reports and communications.	Refocus my priorities to remove barriers that prevent the care receiver from having access to me during their time of need.
Contact your social worker, benefits specialist or insurance client service to improve readiness to manage insurance and benefits for my care receiver and/or family.	Meet with an attorney or estate planner to help me better understand estate, power of attorney and executor tasks for my care receiver and/or family.	Maintain a monthly budget and review on a regular basis.
Contact a counselor, clergy, or social worker to improve your readiness to manage your worry, anger, irritability and anxiety.	Contact a counselor, clergy, or social worker to improve your readiness with spiritual concerns about death, suffering, shame and guilt?	Meet with your physicians to monitor your physical health issues and treatment.
Register for individual or group training sessions to develop and improve your communication skills.	Attend support groups and seminars on how to conduct those awkward conversations and how best to share difficult/bad news.	Building a trusting relationship with family members can be difficult. You trust by understanding the situation, listening, being objective and showing compassion.
Contact Jake Chaya at 612-414-5182		
Email: jake@bridgepaths.com		

Who	Name and Address and/or	Timeframe
Reality Check - BridgePaths	www.bridgepaths.com	At Your Convenience
BridgePaths Financial Planning Caregiver	www.bridgepaths.com	At Your Convenience
MajorHOPE Spiritual Caregiver Platform	www.majorhope.com	At Your Convenience
BridgePaths Professional Advisory Network	www.bridgepaths.com	At Your Convenience
	www.majorhope.com	

Go to : www.bridgepaths.com for full Next Steps and People Guide

BRIDGEPATHS EQUIPS CAREGIVERS TO PROVIDE PREVENTATIVE & MAINTENANCE CARE

	End of Life Checklist
There are three categories to prepare for in the End of Life Financial Plan: Pre-Death Steps, Death, and Post-Funeral Steps	
Pre- Death	
	Create a “Blackbox”, either a file of paper documents or scanned documents on your computer and store them in a safe but easily accessible location.
	Communicate list of people well in advance of any crisis, simply informing them that they are on a list of first wave contacts. This will prepare them for the future and it will also help you determine who shouldn’t be initially contacted
	List of Expenses, Organized Bills, Cash Flow Budget- Designated cash and assets to be used for funeral and estate expenses, online bill paying sites and access codes, directions for the Executor for tracking expenses and reimbursements of estate costs.
Death	
	Request at least six copies of the death certificate. Estate Planning
	Other remaining documents-estate plan, real estate, pre-planned charitable gifts Estate Planning
Post Funeral	
	Claims Processes-Social Security, Defined Benefit, Define Contribution and other retirement plans, insurance claims. Spousal riders, children’s policies, etc. all should be clearly addressed and if applicable all parties informed. Protection Planning/Estate Planning
	Employer Benefits- A variety of benefits such as COBRA Health Savings Accounts, Flexible Savings Accounts, if applicable, executive compensation plans, stock options, restricted stock, deferred compensation, and other compensation strategies. Information on the distribution of employer or business owner benefits needs to be defined and decided up. Reviewing IRAs, 401(k) s and other qualified and non-qualified plans. Financial Position/Protection Planning/Estate Planning
	Meet with family members and relevant professional advisors to begin the restoration process for quality of life.

Go to : www.bridgpaths.com for full End of Life Assessment

For Further Information, contact Jake Chaya, CEO of BridgePaths at:
jake@bridgpaths.com or call 612.414.5182 or go to our website
www.bridgpaths.com

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