

Care Planning by Wellthy

Nearly everyone will be a caregiver at some point in their lives, yet the vast majority of people enter a care situation completely unprepared — risking their well-being, their finances, and their careers to focus on care.

Rather than waiting until a crisis emerges, our Care Planning tool empowers you to plan ahead, stay organized, and feel prepared to give the quality of care your loved ones deserve.

Confidently prepare for future caregiving responsibilities

Care Plans guide you to answer Care Paths intuitively group action Action items surface important your biggest questions through items to help you focus on related information and enable you to take comprehensive Paths, action to-dos notes, upload documents, and items, and educational resources access expert-curated content Juan Ortiz's Care Plan — Action item C ← All Care Plans ← Care Path Evaluate health **Explore long-term** Review finances and living options housing options Review finances and housing Take time to review with your loved one their finances or have them review them options on their own. Discuss whether they have Get ready to plan (In progress a budget for senior housing, in-home 6 of 6 action items complete care, or related expenses. Even if they **⊘** Completed don't need extra care now, a financial plan can help in the future. Document any benefits \rightarrow **Understand current** living situation MARK AS COMPLETE 1 of 3 action items complete DISMISS FOR NOW (1) In progress Prioritize living Review finances or a budget for housing and inoptions August 20 -

Start a Care Plan today!

New Wellthy account?

- Visit join.wellthy.com/ab and click Get Started
- 2. Create you Wellthy account and verify your eligibility
- 3. Select the Create Care Plan tile when prompted

Existing Wellthy account?

- 1. Visit join.wellthy.com/ab and click .
- 2. Sign in with your existing Wellthy credentials
- 3. Click the Plans tile in the left navigation bar