## Checklist Home care services

Arranging home care services for an aging friend or relative can be a confusing process. Many caregivers are not sure what questions to ask to determine if a home care provider is the right one for their situation. The following list of key questions may be useful to consider when arranging home care services and are designed to help you assess and compare providers. These questions are not exhaustive, but will help you in your search. Use a copy of this checklist for each of the home care providers that you are considering.

Name of Home Care Provider:
Contact Name:
Contact Telephone:
Address:
Website:
What are the specific services that are provided?
What are the limitations to services? (What is not provided or included?)

What are the qualifications of the staff?



What special training does the staff have?

Are caregivers available 24 hours per day, 7 days a week?

Will the same person come regularly? If not, how will I know who will be coming?

What happens if a staff member fails to make a scheduled visit?

Who will supervise the staff or volunteers(s) providing the care?

Does the provider have a supervisor on-call 24 hours a day?



Continued

Is someone available to answer questions or respond to a crisis 24 hours a day?

If so, who is that person and how do I reach them?

What are the costs for services?

Am I eligible for any costs to be covered by the provincial or federal government (e.g., veteran's benefits)?

How does the provider handle billing and payment?

Does the provider ensure patient confidentiality? How?



Additional Notes

BMO understands that whether you are new or experienced in the role of caregiver, you have a lot on your shoulders. The responsibilities of looking after a parent, spouse or child can be a significant challenge. You may also be concerned about the financial implications that your role as caregiver may have on your finances over the long-term.

For more information, speak with your BMO financial professional.



BMO Wealth Management provides this publication for informational purposes only and it is not and should not be construed as professional advice to any individual. The information contained in this publication is based on material believed to be reliable at the time of publication, but BMO Wealth Management cannot guarantee the information is accurate or complete. Individuals should contact their BMO representative for professional advice regarding their personal circumstances and/or financial position. The comments included in this publication are not intended to be a definitive analysis of tax applicability or trust and estates law. The comments are general in nature and professional advice regarding an individual's particular tax position should be obtained in respect of any person's specific circumstances. BMO Wealth Management is a brand name that refers to Bank of Montreal and certain of its affiliates in providing wealth management products and services. Not all products and services are offered by all legal entities within BMO Wealth Management.

BMO Private Banking is part of BMO Wealth Management. Banking services are offered through Bank of Montreal. Investment management services are offered through BMO Private Investment Counsel Inc., an indirect subsidiary of Bank of Montreal. Estate, trust, planning and custodial services are offered through BMO Trust Company, a wholly owned subsidiary of Bank of Montreal.

BMO Nesbitt Burns Inc. provides comprehensive investment services and is a wholly owned subsidiary of Bank of Montreal. If you are already a client of BMO Nesbitt Burns Inc., please contact your Investment Advisor for more information. All insurance products and advice are offered through BMO Nesbitt Burns Financial Services Inc. by licensed life insurance agents, and, in Quebec, by financial security advisors. BMO Nesbitt Burns Inc. is a Member-Canadian Investor Protection Fund. Member of the Investment Industry Regulatory Organization of Canada.

® "BMO (M-bar Roundel symbol)" is a registered trade-mark of Bank of Montreal, used under licence. ® "Nesbitt Burns" is a registered trade-mark of BMO Nesbitt Burns Inc.

All rights are reserved. No part of this publication may be reproduced in any form, or referred to in any other publication, without the express written permission of BMO Wealth Management.