

Checklist
Residential care

Arranging residential care for an aging friend or relative is often an uncertain process, especially when you are responsible for choosing a nursing home or retirement residence. The following questions may be useful to consider when visiting and evaluating a residence and can be used to assess and compare each option. Use a copy of this checklist at each of the residences you are visiting.

Name of Residence: _____

Contact Name: _____

Contact Telephone: _____

Address: _____

Website: _____

Are current residents clean and well groomed?

Is the staff friendly and warm to current residents? Do they treat them with dignity and respect?

Are most current residents out of their rooms and dressed?

Is privacy respected?

Is there any obvious offensive odour in the facility?

How many residents share a room?

Do residents' rooms have personal articles and furniture?

Does the food taste good?

Do current residents appear happy?

What activities are available to the residents?

How are families involved in the planning for resident's care?

Will the staff communicate changes in a residents' condition to family members in a timely fashion?

Does this facility meet any cultural or religious needs you may have?

Does staff respond quickly to requests for help?

Do volunteer groups visit the nursing home?

Additional Notes

BMO Financial Group 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.