

# Support Team Organizer – Family Members and Professionals

Think delegation—you will need to master the art of sharing the load. Some tasks are best handled by family members; others will require professional help.

Your support team may change over time depending upon your needs. It helps to create a current support team list with names and contact numbers.

| Task                                    | You | Spouse | Family Member #3 | Financial Advisor | Banker/CPA/Attorney |
|-----------------------------------------|-----|--------|------------------|-------------------|---------------------|
| Parents' cashflow                       |     |        |                  |                   |                     |
| Parents' legal documents                |     |        |                  |                   |                     |
| Review health insurance & LTCH policies |     |        |                  |                   |                     |
| Set up auto bill pay at bank            |     |        |                  |                   |                     |
| Take parents to medical appointments    |     |        |                  |                   |                     |
| Open line of credit for emergencies     |     |        |                  |                   |                     |
| Medical liaison                         |     |        |                  |                   |                     |
| Other                                   |     |        |                  |                   |                     |

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