

Financial Caregiving Reflection Tool

Mary’s Story

After Mary’s dementia diagnosis, her daughters began noticing increasing confusion around financial decisions, unopened mail, and changes in spending habits. As her needs evolved, the family faced new questions about support, communication, and changing responsibilities.

Lever	Reflection	Possible Guardrails
Financial Independence	What decisions can Mary still manage comfortably on her own?	
Oversight	Where might caregivers need greater visibility or awareness?	
Automation	Which tasks could become simpler through automation or reduced complexity?	
Communication	Are roles, concerns, and expectations being discussed clearly?	

Additional Reflection

- What changes may be needed if support needs increase?
- Which responsibilities are currently unclear?
- Where could additional support reduce stress or confusion?

Notes

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