



## *Financial, Estate, and Health Care Planning Documents for Montanans Concerned about Memory Loss*

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### **Resources**

1. **Power of Attorney (Financial)** MSU Extension MontGuide(MT199001HR) (2018)  
[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)  
Explains how to give another person authority to make financial decisions for you through a legal document known as a power of attorney. Information about the Montana Uniform Power of Attorney Act passed by the Montana Legislature is provided. Features of the new Statutory Power of Attorney form are also explained.
  - [Financial Power of Attorney Statutory Form and Agent Statutory Form](#) (PDF)
2. **Health Care Power of Attorney and Related Documents for Montanans MSU Extension Bulletin** (EB0231) (2020)  
[\(PDF Version-ADA Accessible\)](#) [\[Order Online\]](#)  
This 24-page document explains a Health Care Power of Attorney for Montanans, and includes a worksheet and forms to appoint a health care agent(s) and assist others in understanding your health care preferences.
  - [Health Care Power of Attorney Worksheet and Forms](#) (PDF) (2020)
3. **[“My Life, My Values” A Worksheet for Those Facing Memory Loss](#)**: The purpose of this worksheet is to provide you with the opportunity to record your thoughts about the activities you enjoy and hope to continue enjoying as long as is feasible. Hopefully, sharing the completed questionnaire with family members, friends and long-term care staff will open communication channels that will ensure maintaining the best possible quality of life. (PDF) (2021)
4. **[Starting Conversations about Alzheimer’s Road Map for Indian Country](#)** (Centers for Disease Control and Prevention)  
Listening and learning are the first steps toward developing a broad response to Alzheimer’s and other dementias. The Healthy Brain Initiative’s Road Map for Indian Country encourages American Indian/Alaska Native (AI/AN) leaders to start a conversation within their communities about how dementia affects all generations — individuals living with dementia, their families, other community members who help provide care, and even future generations if Alzheimer’s disrupts the sharing of cultural traditions and heritage.

5. [Your Conversation Starter Guide: For caregiver of people with Alzheimer's or other forms of dementia](#) (Institute for Health Care Improvement)

Talking with the important people in our life can bring us closer together. It also helps us create the foundation of a care plan that's right for us — a plan that will be available when the need arises. The Conversation Project wants to help everyone talk about their wishes for care through the end of life, so those wishes can be understood and respected. We created this guide to help you start a conversation (and keep talking) so you can have a say in your health care — today and tomorrow.

6. [A Guide for Representative Payees](#) (Social Security Administration)

A representative payee receives the beneficiary's payments and is given the authority to use them on the beneficiary's behalf. Family members often use a power of attorney as another way to handle a family member's finances. For Social Security purposes, a power of attorney isn't an acceptable way to manage a person's monthly benefits. Social Security recognizes only the use of a designated representative payee for handling the beneficiary's funds.