

X's Affairs Universal Template

This document was compiled by Dr. Claudia Welch in support of various friends, family, and neighbors. It is not a legal document and is not intended to replace legal advice. Rather, it is meant to help organize your—or someone else's—affairs in order to manage them more clearly. Some of the information included here may be outdated, and much of it is specific to Vermont. For example, it contains links to Vermont forms that were valid in 2021. You will need to confirm the accuracy of any legal or procedural information and replace region-specific content with the correct forms and requirements for your own state or country. It could be helpful to run it by an attorney to check what is irrelevant, outdated, wrong, etc.

This document is intended as a flexible starting point—not a substitute for legal instruments such as a will, power of attorney, or advance healthcare directive. It can complement those more formal documents by gathering essential information—personal, financial, medical, digital—in one place, so that it doesn't live only in scattered files or memory. Please do not store sensitive information (like full account numbers or passwords) directly in this document unless it is protected securely. Instead, consider referencing where that information is stored or who has access to it.

This is a read-only document, but commenting is enabled. If you have suggestions, additional resources, or helpful observations, feel free to leave them as comments—these may help improve future versions. If you'd like to use this document to organize your own or someone else's affairs, please copy and paste it into your own file—Word, Pages, or (ideally) a Google Drive document. Google Drive is especially helpful if you're coordinating with siblings or other caregivers, since it allows multiple people to access and update the same version over time.

Personal information

[full name including legal middle name and any previous legal names] :

Mailing Address:

Physical address [address of home]

Date of Birth:

social security number or equivalent: **don't put the social security # in this document on your computer or email it unless it's password protected. But make sure you/your agent & alternate agents have it written somewhere safe for them.** ss phone #: 1.800.772.1213 or, in Montpelier at: 1-877-505-4542

Occupation:

Born in:

Parents resided in:

Married where/when:

Graduated from? High School/college:

Name at birth:

Mother's place of birth:

Father's place of birth:

Mother's name at the time of your birth / their birth:

Father's name at the time of your birth / their birth:

Emergency Contacts

1. **Primary Emergency Contact:** Full name, relationship, phone number, email address, physical address.
2. **Secondary Emergency Contact:** Same details as above.
3. **Local Emergency Services:** Police, fire department, hospital numbers relevant to the person's location.
4. **Key Neighbors:** For example, if someone is living alone, who should be contacted locally.

Caregiver or Dependent Information

1. **Caregiver Info:** If you or someone you know is using a caregiver service, include details on the service or specific caregivers.
2. **Dependents (Children/Parents/Spouse):** Include information about who they are, their contact info, and any important care notes (e.g., special needs, allergies).
3. **Pet Care:** If pets are involved, details about their care (vet info, favorite foods, any health concerns, etc.).

Will (Do you need one? And keeping your car out of probate):

This looks best/simplest for very simple affairs in VT:

<https://eforms.com/images/2016/03/vermont-last-will-and-testament-template.pdf> Called probate court. They said you do not need to register the DIY will with probate court, but many do. It is enough to have it in your strong box or somewhere safe. I also emailed my lawyer re. advice on DIY wills. He said you probably don't need one if you have very simple affairs (eg small bank account and a car) and have a transfer on death form registered at the DMV. Then neither has to go through probate. So no need to register your will with probate. Can make and keep a copy just in case it's needed.

Transferring your car upon death, so it stays out of probate:

From DMV, to keep car out of probate: Car: Transfer on Death (TOD) form (form #VT-007): https://dmv.vermont.gov/sites/dmv/files/documents/VT-007-Transfer_on_Death.pdf to convey the car directly to _____ upon your passing.

Vehicle must be registered to one person only (no co-owner). The owner shall have all rights of ownership and rights of transfer until his or her death. The designated beneficiary shall have no rights of ownership until such time as the owner has died as established by a valid death certificate. At that time, the transferee shall become the owner of the vehicle subject to any existing security interests. No probate court proceeding will be necessary. Requires completion of Transfer on Death (form #VT-007) form.

Transferring your money to someone upon death so it stays out of probate:

List whoever you want as beneficiary/Payable on Death on all your bank accounts, including checking, savings, IRA cds, etc.

For more complicated affairs but for DIY Wills, could consider:

Free, top rated online will tool from <https://www.joincake.com/blog/online-will-maker/> :

<https://www.joincake.com/free-will-1/>

other recommended:

<https://www.nationalmakeawillmonth.org/> (recommended by Dr. Svoboda)

<https://willing.com/>

<https://vtlawhelp.org/deciding-how-property-distributed>

<https://vtlawhelp.org/wills>

<https://www.freewill.com/will/basics/personal/get-started> (Land trust organization. If you donate, you get this free service. Other such organizations likely exist.)

or: <https://eforms.com/images/2016/03/vermont-last-will-and-testament-template.pdf>

VT Bar assn: 800.639.7036 told me about <https://vtlawhelp.org/seniors> and suggested Edward French in Stowe if lawyer is needed 802.253.7339 and tell them that the bar assn. sent me for the no more than \$25/30 minutes initial consult deal.

(Looked into <https://ez-probate.com/> They help navigate probate for a fee, but I think not necessary in simple cases.)

Other legal forms & resources:

<https://legal-forms-usa.no1reviews.com/> reviews of legal forms (recommended by Dr. Svoboda)

Do you need wills in multiple countries? Here's an article on that:

<https://srmlawyers.com.au/do-you-need-wills-for-different-countries-the-impact-of-overseas-assets-on-your-will/> (recommended by Dr. Svoboda)

Include in your will:

- who to contact about your health/well-being/passing
- legal names and ss#s of your beneficiaries

If you don't have a will:

- List of people to contact about your health/well-being/passing

Durable Financial Power of Attorney:

This has been used for at least a couple people I know. It is straightforward and simple. If you trust each other, good to make it valid now so that you don't need to bother with getting a doctor's note or something when you need to take over:

Advance Directive (AD) for Health Care (serves as Medical PoA) & COLST forms:

This is the AD that is simpler than some long forms but sufficient to act as PoA for health too: Need to Register it with the AD registry. If you have this, you do not need a PoA for health. This includes your medical choices and death arrangement choices.

[https://vtlawhelp.org/sites/default/files/Advance-Directive-Long-Form\(fully-accessible\).pdf](https://vtlawhelp.org/sites/default/files/Advance-Directive-Long-Form(fully-accessible).pdf)

You need a COLST form fileA **COLST form** (Clinician Orders for Life-Sustaining Treatment) and an **Advance Directive (AD)** both serve to guide medical care in the event that you are unable to communicate your wishes, but they function in slightly different ways and at different times:

1. Advance Directive (AD):

- **Purpose:** An AD is a legal document where you can outline your general wishes regarding future medical treatment, including decisions about resuscitation, life-sustaining treatments, organ donation, and appointing a health care agent (someone who can make decisions on your behalf). It also includes funeral & burial preferences. In it you can list:
 1. **Funeral Home Preference:** If there's a preferred funeral home, include details here.
 2. **Memorial Service Preferences:** Details on what type of service you'd like, speakers, location, etc.
 3. **Burial or Cremation Preferences:** Specify whether burial or cremation is preferred, and if burial, the cemetery or plot details.
 4. **Organ Donation:** Specify if you wish to be an organ donor and include any documentation regarding this.
 5. **Last Words/Final Wishes:** If you have any special wishes or messages for loved ones, this could be a space to leave that.
- **When It's Used:** An AD is used when you are no longer able to make or communicate your own medical decisions, but **it is not an immediate medical order**. The health care agent or medical team will refer to the AD to guide decisions about your care, but it may not be acted upon in an emergency situation without additional clinician involvement.
- **Level of Specificity:** It tends to cover broader decisions about long-term care and end-of-life preferences, like whether or not you want aggressive treatments if you become severely ill or incapacitated.

2. COLST Form:

- **Purpose:** A COLST is a **medical order** completed by and kept by your primary care practitioner that specifies specific decisions about life-sustaining treatments. It can include orders regarding resuscitation (whether you want CPR), feeding tubes, mechanical ventilation, and other immediate life-sustaining measures. Often people like to put these on their refrigerators too, in case of emergency.

- **When It's Used:** The COLST is used **immediately** by healthcare providers in emergency and non-emergency situations. Since it is a medical order, it is followed as part of your medical record and is meant to be acted upon by emergency medical personnel and other healthcare providers.
- **Level of Specificity:** The COLST form is more specific and actionable than an AD. It provides clear, direct instructions that healthcare providers must follow in a crisis or emergency (like whether or not to attempt resuscitation or use other life-sustaining interventions).

Why You Need Both:

- **The AD provides the broader framework:** It appoints a healthcare agent, and outlines your overall wishes and values regarding your care in a variety of scenarios. However, **it does not necessarily provide immediate instructions** in a medical emergency.
- **The COLST is a specific, actionable order:** It is used in urgent medical situations, like in the event of a cardiac arrest or serious illness, where immediate decisions must be made. Medical professionals can refer to the COLST to guide life-sustaining treatment decisions right away.

Having both ensures that:

1. Your overall preferences are outlined (AD) and
2. There are clear, immediate medical orders (COLST) that healthcare professionals can act on in an emergency.

It's especially useful if you have strong preferences about resuscitation or other life-sustaining treatments that you want followed immediately in a medical setting.

Please have a conversation with your agents about what you want at the end time...going over everything you've said in your AD.

Obituary:

Along with the above forms, you might wish to write a template or information you'd like included in your obituary.

Cremation:

Research the most economical cremation option before death. It is so much better than working it out in the midst of grief. Can ask cw for information on most affordable cremation in Montpelier, VT area (she has them in her local resources computer file for Calais). In the same file she has the, "Private Cremation_Forms" you would need.

Burial:

Green burial is an environmentally conscious method of laying the body to rest, where the body is placed in a biodegradable container or shroud without embalming or concrete vaults, allowing natural decomposition and a return to the earth. This approach supports ecological restoration, avoids toxic chemicals, reduces carbon emissions, and often takes place in natural or conservation-oriented settings. It appeals to those who value simplicity, environmental

responsibility, and a return to natural cycles. While the Green Burial Council (greenburialcouncil.org) offers general guidance, its directory of burial sites is not always up to date—for example, it omits some known options in Vermont, where both dedicated green burial grounds and green sections within conventional cemeteries exist. Local funeral homes or conservation organizations may provide more current information.

Need Birth, death, marriage certificates?

order them here: <https://www.vitalchek.com/vital-records> or at local town clerk.

List of people to contact/not contact in event of your death or if you are unable to contact people for a health reason:

- name/relationship/contact information

Where do you keep the above forms and who has copies?

(Originals and copies of Will, Advanced Directive, Financial POA & COLST forms.)

Where Are They?	Will	POA	AD	COLST
Originals	Where will you keep them?			
Copies	Agent; Alternate agent	Agent; Alternate agent	Agent; Alternate agent; AD registry, your doc	Agent; Alternate agent; your doc

Financial & Asset Info

Banks

list your Financial Power of Attorney agent as your beneficiary/Payable on Death at your bank, on every account. Then it doesn't have to go through probate.

Name and phone # and contact at bank(s) :

Account types and numbers:

Any safety deposit box, etc.?

Any online billpay?

Cards (bank, credit, gas, AAA, etc)

where do you keep them?

Property

Parcel: #

Taxes: where do you keep your property tax info?

Taxes

Where can someone find your property & financial tax information

Car & Driver's license:

Make/model VIN#:

License plate #:

Car insurance contact info:

Driver's license:

Utilities

Contact info & account # info for:

Phone company & cost:

Propane:

Electricity:

Water:

monthly budget/notes			
	Date started	Monthly cost	notes
Medicare part A			Automatically deducted monthly from ss check?
Medicare part B			

Medigap policy (supplements A&B)		\$/month	
Medicare part C		\$/month	
Medicare Part D Prescription drugs		@\$/month	
Rent/mortgage			
phone		@\$ /month	

Medical Information

Hospital/ Primary Care Practitioner (PCP) you would prefer to go to if needed:

Preferred Pharmacy

Name & Address

Doctors

[need to sign consent form for them to share info with your healthcare agent and whoever else you want]

Primary Care Practitioner (PCP):

Address

Phone

Fax

Email

Dentist

Name, address, phone number.

Personal Health History:

1. **Medical History:** Brief notes on significant medical history that might be needed in an emergency.

2. **Medications:** List of current prescriptions or herbal remedies, dosages, and the prescribing doctors.
3. **Allergies:** Any known allergies (medication, food, etc.).
4. **Health Insurance:** Copies of cards and policy details. If Medicare or Medicaid, enter that below.

Medicare

[call them to get permission to have your health care agent to access your account/work on your behalf]

Medicare phone #: 800.633.4227

Customer service 8-8 7 days/week. 877.494.3402

For general info, can go to <https://www.mymedicare.gov>

Medicare ID # : Ss#-A (B) ? (this is also the claim # if you are on original Medicare):

Medigap policy #: none

If you are a US citizen outside the US, what are your coverage terms? Those are provided through which part?

Medicare Parts Explained; Summary/ Info [as of 2021 in Vermont]:

Here's a good webpage describing what Medicare costs are:

<https://www.medicare.gov/your-medicare-costs/medicare-costs-at-a-glance>

Part A--inpatient hospital stay including res., medications as part of the stay, and physician Care. Also covers home health and hospice as long as you're homebound. There is no charge or monthly premium for this. This is covered by original Medicare. [as of 2016,] There is a \$1,484.00 deductible for hospital stays for each benefit period, but you can apply for patient assistance with this from the hospital and the docs there.

.....For each benefit period:

Hospital stays covered, and coinsurance payments are:

-Days 1-60 100% covered

-Days 61-90 80% covered (your cost would be \$371.00/day)

-Days 91 and beyond: \$742.00 for each "lifetime reserve day" after day 90 for each benefit period, (up to 60 days in your lifetime of Lifetime Reserve days)

-Beyond Lifetime Reserve days: you're responsible for all costs?!

Short term Rehab/Skilled Nursing facility coverage and coinsurance payments are:

-Days 1-20 100% covered

-Days 21-100 80% covered (your cost would be \$185.00/day)

-Days 101 and beyond: you're responsible for all costs?!

Home Health and Hospice

All covered except may have to pay 5% for some inpatient respite care.

Part B- covers outpatient hospital/office visits & durable med equipment. Some IV medications...but there may be a 20% coinsurance payment for those.

There is a \$203.00 annual deductible, after which you generally pay 20% of the medicare approved amount for most doctor services, including while you're a hospital inpatient.

The drug coverage depends on the drug and can vary in the amount covered.
Premium= \$148.50/month that is automatically deducted by Medicare directly from ss check.

Parts A&B are considered “**original Medicare**”

Medigap policy: Highly recommended. A friend (J. Kelso) says, “imperative,” it covers the so called “donut hole” with Medicare; supplements parts A&B and covers what they don’t cover. Medigap policies—called “plans” are from other insurers, but approved by Medicare. They don’t cover outpatient prescriptions.

You may have to pay more, or may be denied Medigap coverage if you didn’t get it with your original open enrollment when you became eligible for Medicare, but there can be circumstances where you have rights to getting it even later.

Medicare rates for supplemental plans:

Link to PDF rate table:

https://dfr.vermont.gov/sites/finreg/files/doc_library/dfr-supplemental-medicare-rates-090921.pdf

This explains what the plans cover

<https://www.medicare.gov/medigap-supplemental-insurance-plans/#/m/plans?fips=50023&zip=05648&year=2022&lang=en>

Aetna Comparison chart

https://www.aetnaseniorproducts.com/ssi/assets/pdf/OOC/INDV_MS_VT.pdf

(You do not want) Part C- This is referring to the “advantage plans” (Don’t let it take the place of regular Medicare) .if they qualify for Medicare but there is no benefit to doing so according to Pat Paine (wonderful but since retired) of the Northeast Kingdom Council on Aging. Copley hospital, among others will not accept Part C plans because they don’t pay as much as original Medicare and they drag their feet. Original Medicare is accepted by Copley.

Part D: This is a separate prescription drug plan. Parts A, B and medigap plans don’t cover prescription drugs. Silverscript has a rx drug plan, which is 24.90/month but that may be automatically paid by Medicaid’s low-income subsidy for people that receive Medicaid assistance. You automatically apply for this low-income subsidy w/ the 202MED form—a form used if you are applying for assisted living places under ACCS plan.

Need Help? Central Vermont Counsel on Aging

In Central Vermont, dial the Senior Helpline at 1-800-642-5119. Receptionist: 479.0531

From outside of our service area, our toll-free number is 1-877-379-2600. 59 North Main St. Barre, VT

The VT Association of Area Agencies on Aging provides information and assistance for Medicare beneficiaries (and those about to become eligible) with issues related to Medicare eligibility, enrollment, applying for financial assistance and picking a Part D drug plan. The program is called SHIP, State Health Insurance Assistance Program. One of the main goals of the program is to make eligible Vermonters aware of the financial assistance available to help pay Medicare costs. SHIP also helps review and compare Medicare Part D Drug plans; the drug plan has become very specific (such as pharmacy and drug restrictions) which makes it difficult for beneficiaries to navigate.

You can call SHIP at 1-800-642-5119 or attend a Medicare info session in Barre on the 2nd and 4th Tuesday of every month. For information on the Medicare session, call 802-888-1393.

Medicaid

[call them to get permission to have your health care agent to access your account/work on your behalf]

800.250.8427 (8am-8pm Mon-Fri)

Fax: 802.769.3237

Green Mountain Care #: (same as Medicaid #):

Vision, eye exams, dental, chiropractic, etc. covered through Medicaid.

Digital Assets

1. **Social Media Accounts:** Platforms, usernames, and instructions on what to do with the accounts (e.g., deactivate, memorialize, etc.)
2. **Email Accounts:** Email addresses, providers, and instructions for managing (e.g., Gmail, Outlook).
3. **Cloud Storage:** Information on services like Google Drive, iCloud, Dropbox, etc.
4. **Online Subscriptions:** Any subscription services (Netflix, Spotify, news publications, etc.) that will need to be canceled or managed.
5. **Websites:** Information on what to do with your website and the income it generates, if it does.
6. **Cryptocurrency:** Information on any digital wallets or cryptocurrency accounts, and instructions on how they should be handled.
7. **Passwords:** Where and how to access stored passwords (e.g., password manager, safe, etc.). I have a letter that I copy every year or two and send to my executor that tells them where to find my important information in my house. I include in that information a page that has my current password information, social security number, and other sensitive information that I don't want to email.

Legal Documents

1. **Trust Documents:** Any living trusts, details of trustees, and successors.
2. **Guardianship for Minor Children:** If applicable, specify who will be the guardian of any minor children.
3. **Prenuptial/Postnuptial Agreements:** Any agreements regarding assets and finances.

Miscellaneous

1. **Memberships and Clubs:** Information on memberships to clubs, organizations, or unions (e.g., AARP, Rotary, professional organizations).
2. **Charities:** Any charitable donations you wish to continue after passing, or mention in your will.
3. **Tax Information:** Instructions on where to find past tax returns, accountants' contact info, etc.

Elder care:

If you need to have elder care, what are your preferences, including environs, diet, care, etc:

Support Services

Central Vermont Council on Aging

In Central Vermont, dial the Senior Helpline at 1-800-642-5119. Receptionist: 479.0531

From outside of our service area, our toll-free number is 1-877-379-2600. 59 North Main St. Barre, VT
Central Vermont Council On Aging [+1 802-479-0531](tel:+18024790531) BUT the really nice guy Andrew said better to call their helpline : 802.477.1364 if further questions.

Once you know what the charges are for various services, if you are in the system at VT Council on Aging, they can help contribute to costs through their, “Cart Fund” (if can’t pay? Limited to 200\$ based on greatest need—including especially financial –which is at the top of that list. They would pay the entity directly—you get the invoice and give it to them and they pay it directly) Andrew would be happy to chat with you at the office or home. They would be able to listen to the needs (real or perceived) and help match them with providers. For example:

Green mtn transit (802.223.7287)

can bring people to medical appointments or senior center.

Meals on wheels 802.223.3322

does vegetarian meals. Served by twin valley. Is a bit of a benefit because it is human interaction—even if brief. And might come with a, “safety check” where they check on...your safety? <https://www.twinvalleyseniors.org/> M- W, F9-2

Montpelier Senior Center

223-2518. 58 Barre Street.

Project Independence

Adult Day Services in Barre. Arranges shuttle rides to homes. 802.476.3630 For activities.

(favorite) Hands at Home/"love is": 800.682.5220 "Love is."

Deanna & her husband runs this. Basic companionship and safety, house-keeping, meals, transportation, errands, appointments, personal care. Bathing. Safely ambulating around homes. Going through daily activities. Help provide respite support for family members. Preventative services. 4 hour shift minimum. No maximum. 35\$/hr m-f 36\$/hr on weekends. Tries to work with family for their dream schedule. Really nice lady. Do a video assessment with person about needs and hopes and sets schedule. Federal rate .65 /mile. No cost for the assessment. Would .65/mile apply if using the client's car and not caretaker's car?

Visiting Angel (Bob): 802.862.8777

39\$/hr 4-hr minimum shift (\$156). No maximum. They try to keep the same person with her as much as possible. Could have as little as one person, 1 shift/week or 2 people 24/7 days/week. Just can't start a shift after 10pm. They can provide cognitive care, help bathe, laundry, incontinence, light house-keeping, help them manage their home if cognitive care is an issue, can drive people to Montpelier for errands/appointments (but that is 63 cents/mile). Would .65/mile apply if using the client's car and not caretaker's car?

Tender Loving Homecare

<https://tenderlovinghomecarellc.com/> 802.622.1112.

Rosalyn cooking, cleaning, laundry, transportation to and from doctor's appointments. Lna (licensed nurse assistants) and pca (personal care assistants). 35.95 no minimum. Min 1 hour. 55 cents /mile if use the caregivers car. No charge if using client's car. Dog in the background. Little hurried sense. Didn't call back after I'd left the first message. I had to call her back again.

Living Possibilities

[level 3 care is a lower level of care than level 4, which is nursing home level care. I've highlighted places I think might be more attractive for now, or are worth considering because I may not have looked into them because xx wasn't paying and yyy might be, but it wouldn't hurt to put yyy on the waiting list everywhere. If and when a room becomes available, if you don't take it, it's not like you go to the bottom of the list. You just hang out there until you need it]

Assisted Living & Nursing Homes

Craftsbury Community Care Center (level 3)

1784 East Craftsbury Road, Room , Craftsbury VT 05826 (802) 586-2414

Kim Roberge: administrator

ccccenter@myfairpoint.net

The Manor (level 3 and 4)

Address: 577 Washington Highway, Morrisville, VT 05661

Phone: 802-888-8700

Fax: 802-888-8782

<http://www.themanorvt.org/contact-us/>

Contact: Stephanie Sweet at: SSweet@themanorvt.org

Place is nice and clean, and is equipped for wandering and memory care. Provides both levels 3 & 4 care. Certified in both dementia and palliative care.

"We are committed to not only providing compassionate care but to also ensure that residents receive the most comprehensive clinical care to support their health and wellbeing as they navigate life with dementia or Alzheimer's disease. Ours is a mindful and non-pharmacological approach to promoting dignity and quality of life for older adults with memory challenges, through compassionate care and a focus on the person, not the disease."

Menig Nursing Home (level 4)

215 Tom Wicker Lane

Randolph Center, Vt 05061

(802) 728-7800

Kimberly A. Marcotte

KMarcotte@GiffordHealthCare.org

Contact: <https://morganorchards.com/contact/>

Barre Gardens (level 4)

802.476.4166

610.833.4364 fax

378 Prospect Street Barre, VT 05641

darleth@barre-phg.com

take Medicaid

Nursing home level care

Debbie Arlet been there 34 years.

Lincoln House? (level 4, maybe 3, but long waiting list)

gchinc@sover.net

120 Hill Street

Barre, Vermont

05641

Phone: (802) 476-3283

Greensboro Nursing Home (level 4)

Address: 47 Maggies Pond Rd, Greensboro, VT 05841

Phone:(802) 533-7051

blabelle@vtgbnh.org

Erica is now in admissions

Woodridge Rehabilitation and Nursing (level 4)

Mailing address:

P.O. box 550

Barre, vt 05641

(802) 371-4700

Physical address:

142 Woodridge Drive

Berlin, VT 05602

Mills-Brown, Amanda Amanda.Mills-Brown@cvmc.org

Berlin Health & Rehab Ctr (level 4)

98 Hospitality Drive

Barre, VT

Jennifer Hunt

802.2290308

take Medicaid

Nursing home level care

Ethan Allen Residence (level 3)

Burlington

Mary Mougey

802 658-1573 X1

1200 North Avenue

Burlington VT 05408

mmougey@livingwellgroup.org

Run by the same group that runs Heaton Woods

Memory care accepts Medicaid. Level 3 facility. Excellent food, tai chi and meditation classes and staff.

Allen Brook (level 3)

Williston

Maria Rainville

859.8885

Feb 20, 2020:

Sounds great. Over 100 people on her waitlist.

Level 3 assisted living care community. Not nursing home. 14 “friends” live there with them. Participate in best friends model of care. So not task driven. Really get to know the friends as people.

Memory care accepts Medicaid. Have a locked unit for memory care. No beds available. Over 100 people on her waitlist. Goal is to keep the person as long as possible. But can't manage if pt needs catheter, tubing, etc. Their downtown Burlington, “cathedral square assisted living” branch facility is level 3 but not a secure building so can't accomodate wandering. Submitted the application electronically on 21 Feb, 2020

<https://cathedralsquare.org/>

Fortier's Community Care Home

127 Bailey Street, Barre, VT 05641, USA

802-479-1867

Contact: <http://www.fortierscommunitycarehome.com/contact.html>

Ave Maria (level 3)

Our Lady of the Meadows Richford

Memory care accepts Medicaid

Claire Doe

802.848.3310

Not a nursing home. Residential care home with a secure unit. Patient needs to be ambulatory and feed themselves.

Feb. 2020: Talked with Claire a long time. They have a waiting list. Catholic. Family-run. Their kids joined the business.

The Converse Home (level 3)

<https://www.conversehome.com/>

272 Church Street Burlington, Vermont 05401 | 802.862.0401

Kandace Benedini

Marketing Director

Converse Home

Has memory care. Heidi Thompson's mother loves their assisted living

Feb 18, 2020:

require that our residents have sufficient resources to pay privately for a minimum of three years.

Thank you for reaching out to us. If you have any further questions you can contact me by calling 862-0401 or emailing me at kandace@conversehome.com.

Maple Ridge (level 3)

Jane Samuelsen, CDP

Director of Community Relations

6 Freeman Woods

Essex Junction, VT 05452

802-872-1700 Fax 802-872-6400

jsamuelsen@mapleridgeessex.com

www.MapleRidgeEssex.com

Feb 19, 2020:

Unfortunately, Maple Ridge is not licensed for Medicaid. Additionally, we are a Resident Care Level 3 community and not a skilled Nurse Facility.

I'm more than happy to meet with you and your sister and show you around the community if you are still interested. The Memory Care at Allen Brook located in Williston accepts Medicaid and is a reputable community. However, I believe there is a significant waitlist. Ethan Allen Residence located in Burlington and Ave Maria in Richford are also Memory Care communities that accept Medicaid and have good reputations. I Hope this is helpful.

Mayo Healthcare Inc. (level 4 and maybe 3?)

71 Richardson Ave

Northfield, Vt 05663

(802) 485-3161

Anne Lattrell

M-F

Very few private rooms. It has a very good reputation but I found the scent nauseating.

State of the Art Memory Care

Individualized Support for Elders with Memory Issues

With our Dementia-Certified staff, Mayo's Memory Care program supports elders with Alzheimer's or dementia. We work with families to develop individualized care plans. Our positive, multi-faceted approach, built on current research, aims to help residents stay active and improve their quality of life. With our Dementia-Certified staff, Mayo is in the forefront of an evidence-based national movement to take a positive approach to helping and caring for seniors who have memory issues or Alzheimer's disease. Our Memory Care program aims not just to provide compassionate care, but to improve quality of life. More at: <https://mayohc.org/types-of-care/memory-care/>

Heaton Woods: only take ERC. Not ACCS? (level 3)

Nancy the administrator 223-1157 (Peggy –who we talked with in 2015--may not be there anymore)
Tina@heatonwoods.org. Great garden/food.

Westview Meadows and Gary Home

802.223.1068

There are no financial aid possibilities through ERC or ACCS here. They do have scholarships for Gary Home but those are maxed out a couple years into the future. At Westview Meadows, rooms are about \$2000/month +about a \$200 entry fee. Gary Home is about \$4500+/month.

The Residence at Otter Creek in Middlebury, Vermont, The Residence at Shelburne Bay in Shelburne, Vermont and the Residence at Quarry Hill in South Burlington, VT.

[Dec 22, 2016] We are a Senior Living Retirement Community that offers Independent, Assisted and Memory Care. I have attached our rate sheet for our memory care community at Quarry Hill.

Unfortunately, we are private pay and do not accept Medicaid. We do accept long term care insurance and some folks have been able to tap in VA benefits. I am not sure if this will change your decision with getting on our waitlist. We have three communities ... The Residence at Otter Creek in Middlebury, Vermont, The Residence at Shelburne Bay in Shelburne, Vermont and our newest community the Residence at Quarry Hill in South Burlington, VT. If you have any questions please do not hesitate to contact me. I look forward to hearing from you. Season's Greetings to you and your family. Best, Cathy
The Residence at Quarry Hill Cathy Stroutsos, Senior Sales Marketing Director 802-652-4114 or direct line 802-391-4526 www.residencequarryhill.com

Metiviers and Jinggras in Barre we found not a good fit.

Other housing possibilities:

Home Share Now:

Talked to Cara at 802.479.8544. usually looks for companions to move in w/ and provide services for people who already have their own home.

Custom Sections:

Add additional sections relevant to local requirements or personal circumstances (e.g., specific tax information, managing properties abroad).