



# The Conversation



Topics for seniors  
and those who care for them

**May 2022**

Greetings,

Susan, Kerry & I spend much of our days helping families navigate situations they would rather not be in. Often we get to see the best of people as they give of themselves for the care of a loved one; it can be inspirational.

I wanted to highlight one such experience that was both inspirational and tragic but I thought served as a reminder of why having a plan for care can be lifesaving.

Over the past month or so we were working with a gentleman who was taking care of his 105 year old uncle. At 105, the uncle had truly outlived all of his family, save for his 67 year old nephew.

The uncle had no medical concerns but struggled to do things for himself. Personal finances, upkeep of his house, and his own hygiene were too much for him, so his nephew stepped in, secured an aide, took care of the finances and, did what he could with the decaying house.

The calls for help when the aide was not on duty or had failed to show up, along with the burden of worrying about finances and ever-increasing house repairs took over the nephew's life, even impacting his marriage. It is a stress that many caregivers are familiar with. Still he persevered, caring for and doting on his uncle, because *'...it's what you do.'*

The stress, though, increased and, eventually, manifested itself cognitively. The nephew found himself missing appointments and struggling to remember simple tasks. Concerned that he might have dementia the nephew visited a neurologist, had a PET scan done, and was prescribed Namenda. Still his focus was on the care of his uncle.

Uncomfortable that his lapses might leave his uncle in a vulnerable position he asked us to get his uncle the support he needed. We worked with his uncle's attorney to make sure the proper legal documents were in order, connected him with a Geriatric Care Manager and, ultimately found an assisted Living Community convenient to the nephew's home.

The day after his uncle moved into his new community, the nephew had a seizure and ended up in the hospital, a week later his wife found him on the floor of their home. He died in loving service to his uncle and truly gave his loved one everything he could. Even in what would prove to be the waning days of his own life, his focus was on providing for his

uncle.

The cautionary tale lies in what would have happened had he not considered, "What if?" and had not put together a plan for his uncle that would provide care even if he couldn't. In this case he was able to do that just in time, but many families put it off because it's an uncomfortable conversation, and a difficult task.

Had this gentleman not had the courage and dedication he did in extremely challenging times this family's tragedy could have been even worse. I will never forget his unwavering focus on and love for his uncle.

*"It matters not how long we live but how." - Philip James Bailey*

## Is an IRS Imposter Targeting You? *How to tell the difference between legitimate contact and a scammer*



The IRS tax filing deadline is now behind us—and most taxpayers are breathing a sigh of relief. But while we can put the annual chore of calculating our taxes behind us for the year, there's another IRS-related issue to keep on our radar: IRS imposter scams.

If you've ever received a suspicious voicemail, email, or text message from someone purporting to be an IRS agent, you're not alone. The U.S. Treasury Department received reports of **more than 2.5 million scam calls from IRS impersonators between October 2013 and March 2021**. The 16,000 victims of these cons collectively lost more than \$82 million. Like most scams, seniors are often the targets.

With many of us eagerly awaiting a tax refund (or dreading a potential audit), how do we know when correspondence from the IRS is legitimate—or a scam?

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