



A Client Resource for Preparing Finances for Continuing Care Expenses

May 2026

Reviewing your Finances

Whether you are planning to stay independently in your own home, receive support from Home and Community Care, or are planning to move to a lodge or a continuing care home (CCH), it is important to understand the costs involved.

To help organize the review of your finances the following pages contain a work sheet and a list of resources that may be of interest to you.

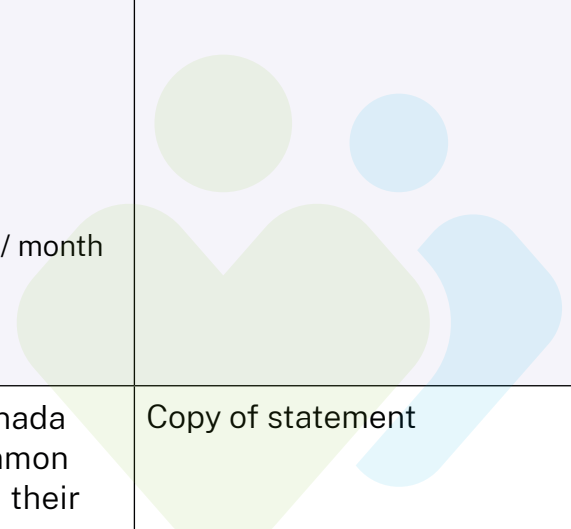
If you require support to complete this process, please reach out to your family, designated support person (DSP) or your Assisted Living Alberta case manager.

The Moving to a Continuing Care Home: An Information and Decision-Making Guide for Albertans, is available on the AHS website- [AHS.ca](https://www.alberta.ca/where-do-i-start-when-moving-to-a-continuing-care-home.aspx), Information for Continuing Care Where Do I Start ([Where Do I Start? | Alberta Health Services](https://www.alberta.ca/where-do-i-start-when-moving-to-a-continuing-care-home.aspx)) or from your case manager. It contains helpful information about continuing care homes, along with check lists to help decide which continuing care home is right for you.

Did You Know? / Home is the most comfortable environment for recovery and the best environment to make life changing decisions such as moving into a continuing care home. These types of decisions are best made at home with family and loved ones.



Worksheet for reviewing your finances

Topic	Documents/information required
Are you eligible for the Alberta Health Care Insurance Plan?	AHCIP (health care) Card
Do you have any government issued identification? (i.e. driver's license or passport)	Have these on hand/available
Do you have access to your bank account?	Copies of bank statements for the last three months
Do you have an Enduring Power of Attorney?	Copy of Enduring Power of Attorney
Are you up to date/current on your income tax filing for the current tax period and all previous periods?	Copy of last Revenue Canada Notice of Assessment
Do you have any debt?	
Do you have anyone who depends on you for financial support?	
Do you receive any of the following: Defined benefit pension plan (DBPP), Defined contribution pension plan (DCPP), Pooled registered pension plan (PRPP) \$_____/ month Canada Pension Plan \$_____/ month Survivor's Pension \$_____/ month Old Age Security \$_____/ month Alberta Seniors Benefit \$_____/ month Guaranteed Income Supplement \$_____/ month AISH\$_____/ month Modified Living Allowance \$_____/ month	Total amount of benefits received monthly: 
If applicable, have you filed with Service Canada for Involuntary separation (spouses and common law partners living apart for reasons beyond their control)?	Copy of statement
Have you completed a disability tax credit certificate?	Copy of certificate
Do you have private health insurance?	Copy of insurance policy



Client Resource List

Government of Canada Resources

- Benefits Finder - <https://www.canada.ca/en/services/benefits/finder.html>
- Find free newcomer services near you - <https://ircc.canada.ca/english/newcomers/services/index.asp>
- Veterans Affairs - <https://www.veterans.gc.ca/en>
- Programs and services for seniors - <https://www.canada.ca/en/employment-social-development/campaigns/seniors.html>
- Income and benefits for Older Canadians - <https://www.canada.ca/en/employment-social-development/corporate/seniors-forum-federal-provincial-territorial/government-income-benefits.html>

Government of Alberta Resources

- Affordable housing and homelessness supports - <https://www.alberta.ca/affordable-housing-and-homelessness-supports>
- Alberta Aids to Daily Living (AADL) - <https://www.alberta.ca/alberta-aids-to-daily-living>
- Alberta Seniors Benefit - <https://www.alberta.ca/alberta-seniors-benefit>
- Assured Income for the Severely Handicapped (AISH) - <https://www.alberta.ca/aish>
- Child and Youth Support Program - <https://www.alberta.ca/child-youth-support-program>
- Continuing care – Resident accommodation charges - <https://www.alberta.ca/continuing-care-accommodation-charges>
- Health care services covered in Alberta - <https://www.alberta.ca/ahcip-what-is-covered>
- Resources to help seniors age in their community - <https://www.alberta.ca/seniors-resources>

Additional Resources

- Advance Care Planning - <https://www.albertahealthservices.ca/info/Page12585.aspx>
- Continuing Care - <https://www.albertahealthservices.ca/cc/Page15328.aspx>
- Moving to a Continuing Care Home: Information Guide - <https://www.albertahealthservices.ca/assets/info/pf/cc/if-pf-cc-moving-to-a-new-home-in-continuing-care.pdf>
- Palliative care health benefits - <https://www.alberta.ca/palliative-care-health-benefits>