



# Dementia Friendly Legal and Advance Planning

Legal and advance planning professionals help people living with dementia protect their rights and plan for the future. This Dementia Friendly America Sector Guide outlines practical actions that attorneys, legal aid teams and office staff can take to provide supportive and accessible services for clients and their care partners, with simple steps to strengthen communication, streamline processes and ensure ethical person-centered practice.

## UNDERSTANDING DEMENTIA

Dementia is a general term used to describe a group of symptoms that affect memory, thinking, communication and decision-making in ways that interfere with daily life. It is not a normal part of aging. Common symptoms include memory loss, confusion, trouble finding words, difficulty planning or solving problems and changes in mood or behavior. Alzheimer's disease is the most common cause of dementia. Other types include Vascular Dementia, Lewy Body Dementia and Frontotemporal Dementia.

In legal settings, dementia may affect a person's ability to follow explanations, complete documents or remember important information.

## BUILD DEMENTIA AWARENESS

Provide dementia-awareness training for all staff through programs such as Dementia Friends or invite local experts to lead educational sessions or workshops.

Integrate dementia education into staff orientation, annual training and professional development programs.

Support employees who are providing care to someone with dementia by offering flexible scheduling, access to employee assistance programs or referrals to resources like the Eldercare Locator and the Alzheimer's Association Helpline.

## COMMUNICATE CLEARLY AND RESPECTFULLY

**Engage the person before speaking.** Say the person's name, make eye contact and face them directly.

**Speak slowly and clearly.** Use short, simple sentences with one idea at a time.

**Use a warm, friendly tone of voice.** Be calm, positive and respectful.

**Smile and be kind.** Friendly expressions help the person feel safe and supported.

**Ask one question at a time.** Offer simple choices, like yes/no or "Would you like to sit here or over there?"

**Give the person extra time to respond.** Pause and wait patiently—avoid rushing or finishing sentences.

**Repeat or rephrase if something is not understood.** Use simple words or shorter phrases to support understanding.

**Reduce distractions.** Minimize background noise so it is easier to focus.

**Pay attention to non-verbal cues.** Watch for signs of confusion, stress or discomfort and respond calmly and supportively.

## IMPROVE THE PHYSICAL ENVIRONMENT

**Provide large-print, high-contrast signs.** Use simple words and familiar icons (e.g., exits, restrooms and conference rooms) placed at eye level to guide people.

**Keep floors safe and dry.** Avoid shiny or patterned floors that can cause glare or confusion and mark stairs or ramps with bright, high-contrast tape or paint.

**Keep lighting bright and even in all areas, especially hallways and restrooms.** Reduce glare and shadows to help people see clearly and feel safe moving around.

**Provide comfortable, stable seating that is easy to get in and out of.** Place sturdy chairs with armrests in waiting and meeting areas.

**Make restrooms easy to find and safe to use.** Post clear signs and maintain bright, even lighting. Install grab bars and offer single-use or family restrooms when possible.

**Designate a quiet area.** Offer a calm space for clients or care partners to rest or regroup if needed.

**Assist with wayfinding.** Help clients move between reception, meeting rooms and exits.

## ENSURE ETHICAL PRACTICE AND CLIENT PROTECTION

Identify and meet privately with the primary client when others are present to ensure voluntary participation.

Maintain confidentiality and obtain written consent before sharing client information.

Stay current on laws affecting guardianship, capacity, financial protection and elder abuse.

## ENHANCE SERVICE DELIVERY AND CLIENT SUPPORT

Simplify intake and scheduling by offering verbal help with forms, sending key documents in advance, and setting appointments when clients are most alert—typically in the morning.

Support client understanding during meetings by beginning with a brief recap of previous discussions, presenting information in short, sequential steps, and allowing breaks as needed to maintain focus and reduce fatigue.

Summarize key points in writing and follow up to confirm understanding and next steps, giving clients and care partners clear notes to review later.

## STRENGTHEN CAPACITY ASSESSMENT AND DOCUMENTATION

Recognize that a dementia diagnosis does not automatically mean incapacity; capacity varies by decision and circumstance.

Use structured tools such as the ABA/APA Assessment of Capacity in Older Adults to evaluate.

Record observations about comprehension, communication and engagement to protect both the client and firm.

Request a professional capacity evaluation when doubt remains after attorney assessment

## ENGAGE THE COMMUNITY

Provide public education on legal and advance planning for people living with dementia and their family members.

## FOR ADDITIONAL RESOURCES



Become a Dementia Friend  
[dfamerica.org/become-a-dementia-friend/](https://dfamerica.org/become-a-dementia-friend/)

Alzheimer's Association Helpline  
800-272-3900 | [www.alz.org](https://www.alz.org)



Find or Start a Memory Cafe  
[dfamerica.org/](https://dfamerica.org/)

Eldercare Locator  
800-677-1116 | [eldercare.acl.gov](https://eldercare.acl.gov)



Scan or visit  
[dfamerica.org/resource-listing](https://dfamerica.org/resource-listing)



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