

# one source Empowering Caregivers

NEWSLETTER SPRING 2024



## National Volunteer Week April 21-27, 2024

National Volunteer Week is celebrated annually during the third week of April. This week-long celebration is about placing a spotlight on inspiring figures whose invaluable seeds of kindness through volunteering are bettering the community and our world in general. This significant celebration which was established in 1974 provides the perfect opportunity to say thank you. It also challenges us to do better and look for ways to be active participants, joining hands to impact our local communities and calling for more support.

Volunteers are an essential part of nonprofit organizations. Without people who donate their time, money, and energy, nonprofits could not continue to grow.

Coming out of winter and moving into spring is a great time to think about becoming more active in the local community and around the world.

Many people volunteer because they want to help other people in their community but there are also a number of benefits that arise for the people who do the volunteering such as lowered blood pressure, improved mental health, feeling more connected to community, and life longevity.

We hope National Volunteer Month will encourage people to reach a bit outside of themselves and consider the ways that they can be of help or service to others who might be in need.

## OSEC Volunteer Spotlight: Megan Wells

Megan Wells is a dedicated advocate and volunteer committed to supporting marginalized populations overlooked by societal systems. With a profound passion for end-of-life care, Megan tirelessly works to ensure that every member of our community can experience their final days with dignity, peace, and optimal health. Firmly rooted in the principles of mutual aid and community collaboration, Megan believes in the power of collective action to uplift and support those in need.

Megan is thrilled to be joining One Source Empowering Caregivers after learning of their mission and value to the community. She will be focusing on client care and backend operations with an eye towards efficiency - something her project manager brain is always seeking! In her role at OSEC, she especially loved getting to chat one on one with great clients and has loved learning about the extensive networks of care and support that exist in Nevada County.

In addition to her commitment to end-of-life care, Megan is actively engaged in other volunteer efforts, including serving as a board member of Nevada County Pride. Through her multifaceted involvement, Megan strives to create a more compassionate and inclusive society for all.

Outside of her advocacy work, Megan prioritizes spending time outdoors, cherishing moments with her partner and pup, and embarking on adventures with her 4-year-old nephew whenever possible. She finds joy in connecting with nature and nurturing her sense of wonder and curiosity.



**THURSDAY, MAY 2, 2024**

[empoweringcaregivers.org](https://empoweringcaregivers.org)

# 2023 Donor and Sponsor Appreciation and Recognition

Your incredible and generous financial support for the year 2023 is so very outstanding and recognizes One Source-Empowering Caregivers value and contribution to the community.

Thank you for your donations, sponsorships, and grants of \$10,000+ year end-2023 to the in-home family caregiver programs. With your donation monies to help support and sustain the organization and its mission, it is our goal for 2024 to invest in a respite collaborative with our family caregivers and our youth groups in the county. The in-home family caregiver peer support group is growing every month. The office telephone communication averages 40-50 in-coming calls a month from family caregivers and others researching our programs and services. In closing the data for the year 2023, **volunteers have served 3000+ hours.**

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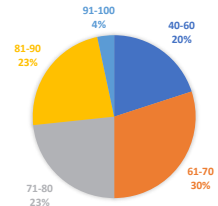
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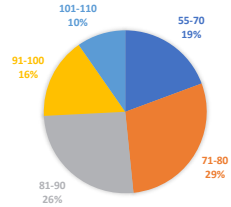
Theresa Haleen

### OSEC DASHBOARD (February 2024)

#### CAREGIVER AGE RANGE



#### CARE RECIPIENT AGE RANGE



CELEBRATING ANOTHER YEAR OF SERVICES

TO IN-HOME FAMILY CAREGIVERS BECAUSE OF YOU... *Thank You*

# Is Assisted Living Tax Deductible? What You Need to Know.

Article by Rebecca Schier-Akamelu, assisted living writer  
Reprinted from A Place for Mom, [www.aplaceformom.com](http://www.aplaceformom.com)

Paying for long-term care is an expensive, significant life change, but here's one thing to keep in mind: Some of the medical expenses associated with assisted living are tax deductible. Whether you're helping a parent with their expenses or paying for your own care needs, you can take advantage of the medical tax deduction. To determine what's eligible, you may need to ask your community for an itemized list of expenses. Remember that nonmedical assisted living expenses, like room and board, aren't tax deductible, but services such as medication management generally are.

Medical expenses that are more than 7.5% of someone's adjusted gross income (AGI) are eligible for the medical deduction, according to the IRS.<sup>[01]</sup> So while there isn't one specific assisted living tax deduction, you can deduct the medical portion of assisted living expenses, such as caregiver assistance. Other expenses, such as room and board, aren't considered medical expenses.

To deduct long-term care expenses, your loved one must fit the IRS' definition of chronically ill and have a care plan. Typically, seniors moving into an assisted living community receive an assessment of their care needs before moving in. Then they'll receive a care plan from either their doctor or the caregivers at the community.

Someone qualifies as chronically ill if they require assistance with a minimum of two activities of daily living (ADLs). These can include the following: bathing, continence, dressing, eating, toileting, transferring. Your loved one would also be considered chronically ill if they need substantial supervision to stay safe due to a cognitive impairment. Many memory care expenses are also tax deductible.

Many of the services that your loved one receives from caregivers in their community qualify for the medical tax deduction. Assistance with personal care tasks may not be something you'd think of as medical care, but these costs are deductible since needing help with ADLs meets the definition of chronic illness. Keep in mind that while these services are classified as nursing care, they don't have to be administered by a nurse.

Some common assisted living expenses that are generally tax deductible are medication management, ADL assistance, therapies that are part of a medical treatment, and transportation to and from the location of your medical care.

In addition to care services, some medical equipment and devices are also eligible: oxygen and oxygen equipment, hearing aids and repairs, eyeglasses and contacts, laboratory fees, wheelchairs, prescription medications, necessary surgeries that are not for cosmetic purposes, X-rays.

This isn't an exhaustive list, and your loved one may have other expenses that qualify for a tax deduction. Whether you purchase or rent equipment from a community or elsewhere, all of these expenses are important to track to help you meet the threshold for a tax deduction.

Also, while your loved one may use something for multiple years, such as a wheelchair, you can only deduct the item for the year it was purchased. If you're unsure about what you can deduct, consult a tax professional.

A parent's assisted living medical expenses are tax deductible, provided that certain conditions are met. According to the IRS, you can deduct medical expenses for yourself, your spouse, and your dependents. The IRS lays out specific guidelines for who is and isn't a dependent.

If your parent has a relatively low gross income, you might wonder with whether their Social Security benefits would be included in that amount. This will vary, but you can expect that a percentage of their Social Security benefits will count towards their gross income.

If you can't claim your parent as a dependent, you may still receive the medical expenses deduction through specific exceptions.

Whether you work with an accountant or use a program such as TurboTax, you'll need to keep an itemized record of relevant medical expenses. The IRS maintains a list of eligible expenses, with specific guidance on which assisted living expenses can be deducted.

Medical expenses become eligible for a deduction only if they total more than 7.5% of your AGI. The AGI will be the same or lower than your gross income, since adjustments typically include things like student loan interest or contributions to a retirement account.

Assisted living can be quite costly. If you're unsure how much you'll be able to save using the medical expenses deduction, you might consider other payment options for long-term care. With several private and public options available, including life insurance policies and Medicaid, you may find ways to stretch your budget.

You can also work with our Senior Living Advisors to find affordable assisted living communities within your budget. Their advice always comes at no cost to you.



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