

- Assess your current home and location to determine how well the place you live will satisfy your needs and wants as you grow older.
 - Does the home require any changes to address aging in place (i.e. grab bars in the shower, wheelchair access)?
 - Is it time to sell? If your current home doesn't satisfy aging in place needs, is it time to find a home that does (maybe a first-floor master, wide hallways, near loved ones)?

- Visualize what you want your future housing and lifestyle options to provide you and begin your research and preparations now.
 - What care would you like in the future (age in place, retirement community)?
 - Cognitive versus mobility issue—how would care differ?

- Complete a self-appraisal of your current health status, mobility and level of cognitive functioning. Consider what you value most and what concerns you most in each of these areas as you prepare for later life.
 - Are you comfortable with current doctors—have they been introduced to adult children?
 - Are there specialists with whom you should establish a relationship?
 - Consider Truepoint's bill pay offering (information available on request).

- Communicate your wishes and plans for your later years to those who are important to you.
 - Communicate where important documents and passwords are kept.
 - Re-evaluate ancillary documents (Healthcare and Financial Power of Attorneys) annually. Make sure Power of Attorney is on file with custodian.
 - When would you like to include your adult children in client meetings? Schedule a family meeting.

- Evaluate your current lifestyle to identify people, possessions and places of special meaning and importance to you.
 - Adequate support network in place—close friends, near to family.
 - Do you have any collectibles? If so, what happens to them after your death?

- Think about your current activities and identify those that are most important to you and give you a sense of purpose, pleasure and fulfillment.
 - Will physical or mental decline limit your activities? Are there alternatives you may want to pursue now?

- Itemize the functions you perform that are central to your current lifestyle and establish a baseline and rating system for evaluating your capabilities over time.
 - How will driving be assessed—agreeable to annual driving assessment?

- Identify triggers that will signal the need to adjust your lifestyle, arrange for assistance or to relocate.