

Living Arrangements for the Future

Today's decisions create tomorrow's plans.

Getting Started

Have you thought about, or perhaps even made plans for, care you might need in the future? Making some of these decisions now can help you prepare for the future, financially and emotionally.

LIVING ARRANGEMENTS

Where do you want to live when you're older and may need additional help with things like getting around, managing meals, medications, and medical care?

Location

Would you prefer to continue living in your current city, or would you be open to moving somewhere else?

- I want to keep living in my city
- I'd be open to moving somewhere else

Some places I can see myself living are:

Environment

Do you prefer a social environment or a solitary environment?

- I prefer a social environment
- I prefer a more solitary environment

Which of the following do you have the strongest preference towards?

- I'd like to stay in my own home as long as possible
- I'd like to move to a family member's home
- I'd like to move to a facility that can care for me

VALUES

When thinking about where you might live in the future, it can be helpful to establish what your values are. This can help you to evaluate your options from a place of clarity, rather than reaction.

I value my independence above all else.

True False

It's important to be able to prepare my own meals.

True False

It's important to be able to drive my own car.

True False

It's important that I can live with my pets.

True False

I'm comfortable sharing a room with someone I don't know.

True False

It's important that I can connect to the Internet.

True False

It's important to live with my own furniture and possessions.

True False

It's important to be able to have guests in my home.

True False

FINANCES

Figuring out how to pay for the future is a daunting task. Taking an inventory of steps you've already taken and steps you need to take can help as you create a plan.

Have you put money aside for future living expenses?

Yes No

If you've put aside money, how have you done so?

I've set up a trust

If you've set up a trust, where is the relevant paperwork located?

I have a dedicated bank account

If you have a bank account, what is the name of the bank? Where is any relevant paperwork located?

I have a retirement account

If you have a retirement account, what is the name of the company that manages that account? Where is any relevant paperwork located?

I have long-term care insurance

If you have long-term care insurance, who is the provider? Where is any relevant paperwork located?

Medicare or Medicaid will help pay for it

Other

If other, please explain:
