



# *What It Means to Be Me*

Develop a  
Financial  
Dashboard

Address:  
Uncover  
Long-Term  
Care Costs

M:  
F:

Retirement  
Community

Private  
Residence

Develop  
Healthy  
Habits

Gather  
The  
Right  
Team

# LifePlan: What It Means to Be Me \_\_\_\_\_

(Name)

**Entertainment for me means:** (Select all that apply)

☐ **Reading**

The kinds of things I like to read include (Such as fiction/nonfiction books, news, etc.):

\_\_\_\_\_

The medium I prefer to read includes (books, magazines, newspapers, on tablets, etc.):

\_\_\_\_\_

☐ **Music**

The kinds of music I enjoy include:

\_\_\_\_\_

Times when I like listening to music include:

\_\_\_\_\_

Music I don't like includes:

\_\_\_\_\_

☐ **Television**

The kinds of shows I enjoy include:

\_\_\_\_\_

Time of day I enjoy watching include:

\_\_\_\_\_

☐ **Movies**

The kinds of movies I like to watch include:

\_\_\_\_\_

Types of movies I don't like include:

\_\_\_\_\_

(Name) \_\_\_\_\_

### Additional Entertainment Notes:

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

**Pleasant surroundings for me means:**

My Living Space preferences include (decorations, view, scents, etc.):

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My Location preferences include (city vs rural, near water, near forests, etc.):

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(Name) \_\_\_\_\_

**Healthy Habits for me means:** (Select all that apply)

### **Eating Right**

The foods I really enjoy eating include:

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Foods I do not like include:

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My food allergies or digestive challenges include:

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### **Exercise / Activities**

Places I enjoy visiting include:

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Activities I enjoy include:

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### **Socializing**

The types of social interactions I enjoy include (large groups, close friends and family, religious visitors, etc.):

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The frequency of social interactions I enjoy is (constant companionship, regular visits, or occasional check-ins):

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(Name) \_\_\_\_\_

**Other things you should know about me:**

My blood type is: \_\_\_\_\_

I have the following allergies: \_\_\_\_\_

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I have the following chronic health conditions: \_\_\_\_\_

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Additional notes about me: \_\_\_\_\_

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[illegible]