**Early Stage Planning Tool**

This planning tool is designed to help you prioritize ways to live well now and in the future.   
**Please check the box next to up to three things in each column below that matter most to you now:**

|  |  |  |
| --- | --- | --- |
| **Health & Independence** | **Joy in Life** | **Connection & Purpose** |
| * Prioritize unmet basic needs or safety risks\* * Regular exercise * Support with technology\* * Personal assistance\* * Meal planning & preparation * Medication management * Housekeeping & chores * Monitoring & managing finances\* * Coordinating medical, mental health & dental care\* * Planning - medical & legal/financial | * Social outings or events * Creative art & cultural activities * Sports or physical recreation * Games or puzzles * Food * TV/movies * Music * Learning/growth * Outdoors/nature * Physical/sexual intimacy * Travel/adventure/novelty * Quiet time | * Quality time with friends & family * Meeting new people * Sharing my story or legacy * Religious or spiritual practices * Helping other people * Helping around the house * Caring for pets or animals * Gardening or being in nature * Participating in research or advocacy * Contributing to the community * Volunteering * Avoid becoming a burden on others * Support with grief and healing |

\*See [**Glossary of Terms**](#glossary) for more detail

**Of the three things that you checked in each column, which one matters most at this time?**

|  |  |
| --- | --- |
| **Top three things that matter most:** | **Ways other people can support the things that matter most** |
|  |  |
|  |  |
|  |  |

**Who can help with the most important things?**

|  |  |
| --- | --- |
| **Examples** | **Notes** |
| Family or friend |  |
| Neighbor |
| Paid professional |
| Community program |
| Volunteer |

**What might make it difficult to get help?**

|  |  |
| --- | --- |
| **Examples** | **Notes** |
| Discomfort or embarrassment |  |
| Lack of clarity about what is needed |
| Friends/family are busy or live far away |
| Language or cultural differences |
| Lack of ability, knowledge, or skill |
| Conflicting values or opinions |
| Concerns about privacy or security |
| Financial limitations |

**Strategies:**

|  |  |
| --- | --- |
| **Examples** | **Notes** |
| Offer something in exchange |  |
| Make a SMART request (Specific, Meaningful, Actionable, Realistic, Time-limited) |
| Match request to the person’s skills/availability |
| Consider ways that people can help remotely |
| Reach out to people/groups in the community |
| Check eligibility for programs & public benefits |
| Make a written agreement with clear expectations and limits |

**Glossary of Terms**

|  |  |  |
| --- | --- | --- |
|  | **Examples** | |
| **Basic needs** | * Safe stable housing * Food * Money to pay bills and buy necessities * Substance use | * Medical and dental care * Vision, hearing, and communication aids * Transportation * Abuse or exploitation |
| **Help with technology** | * Password manager * Simplifying smart devices (phone, tablet, TV, speaker, Alexa) | * Video conferencing * Internet security * Troubleshooting |
| **Personal assistance** | * Meal planning/preparation * Scheduling/calendar management * Arranging transportation or travel * Monitoring household inventory * Shopping/running errands | * Online shopping and package returns * Home and auto maintenance * Clutter removal & organizing * Electronic communication * Pet care |
| **Managing finances** | * Automatic bill-pay * Monitoring/minimizing subscriptions * Consolidating accounts | * Identify “trusted contact person” * Budgeting and monitoring spending * Help with tax preparation |
| **Managing medical & dental care** | * Insurance and public benefits * Scheduling & joining appointments * Communication with providers * Notetaking, maintaining records | * Medications * Glasses, hearing aids * Durable medical equipment and supplies |

**Tools & Resources**

|  |  |
| --- | --- |
| **Organizing paperwork** | * <https://www.nia.nih.gov/sites/default/files/2023-04/worksheet-important-documents-and-paperwork.pdf> * <https://www.thenokbox.com/> * <https://www.everplans.com/> |
| **Home safety & adaptation** | * <https://www.enablingenvironments.com.au/downloads.html> * <https://alz.org/media/Documents/alzheimers-dementia-home-safety-checklist.pdf> * <https://rebuildingtogether.org/> * <https://www.habitat.org/> |
| **Medical & legal/financial planning** | * <https://prepareforyourcare.org/en/welcome> * <https://planforclarity.org/en/welcome> * <https://www.alz.org/help-support/caregiving/financial-legal-planning> * <https://www.consumerfinance.gov/> |
| **Agreement Templates** | * <https://domesticemployers.org/resources-and-faqs/templates/> * <https://www.caregiver.org/resource/personal-care-agreements/> |
| **Support Groups & Social Programs** | * <https://dementiaallianceinternational.org/get-support/join-a-support-group> * <https://www.communityresourcefinder.org/> or Alz Assoc 24/7 Help Line 1-800-272-3900 * <https://frontporch.net/connect/well-connected/> * <https://www.helpfulvillage.com/the-village-movement> |
| **Community Services** | * <https://eldercare.acl.gov/> |
| **Professional Organizations** | * Care Managers <https://www.aginglifecare.org/> * Professional Organizers <https://www.napo.net/> |
| **Advocacy & Research** | * <https://alzimpact.org/> * <https://clinicaltrials.gov/> |
| **Health Promotion** | * <https://healthybrains.org/recipes/> * <https://www.ymca.org/what-we-do/healthy-living/fitness/older-adults> * <https://www.healthinaging.org/> * <https://www.nia.nih.gov/health/exercise-and-physical-activity> * <https://www.alz.org/help-support/i-have-alz/live-well> * <http://www.myneurosciencecenter.com/MyNeuroscienceCenter/files/770/> |