

bQuest.

AGING WELL

Aging Wishes
Prompts



Developing a vision of “aging well” is incredibly important because it allows individuals to maintain control over their future, ensuring that their preferences are respected when they may not be able to communicate them clearly. As we age, our physical and cognitive abilities can change, which makes it vital to have open conversations about the kind of care we would want in the future.

By **sharing these wishes early on**, we help our loved ones navigate tough decisions with clarity and confidence, reducing the uncertainty they might face when the time comes. This not only gives us all peace of mind, knowing our desires will be honored, but it also lessens the emotional and logistical burden on the family, allowing them to focus on supporting us rather than struggling with difficult choices. In essence, communicating aging care wishes creates a foundation for a more compassionate, respectful, and organized approach to our care in later years.

Whether you are developing a vision of “aging well” for yourself, supporting your spouse or encouraging your aging parents to consider their wishes, it is **important to reflect on these important decisions and share your vision** for the future with your loved ones.

This prompt guide is **intended to spark discussion** and/or reflection, while potentially creating a framework for communicating one’s wishes.

CARE COORDINATION

POWERED BY **bQuest**

VISION OF AGING WELL

- What does “aging well” mean to me?
- What goals and aspirations do I have for my later years?
- What do I worry about most in aging?
- What legacy do I want to leave?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

SUPPORT SYSTEM

- Who are the individuals in my family that I can rely on for support?
- Who can I rely on in time of crisis or emergency?
- Will it be easy to communicate my needs and expectations to my family members?
- Who are friends that I can rely on for support?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

MEDICAL

- Where have I listed my medical service providers and primary doctors, specialists?

- Have you appointed a healthcare proxy or established a living will to outline your medical treatment preferences?

- Do I have a list of all supplements and prescription drugs that I take that gives instructions on the following?
 - Name (brand and generic)
 - Strength / Dose
 - I take this for...
 - I take this what time of day...

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

CAREGIVING

- As I age, the one person I will depend on most is?
- The second person I will depend on most is?
- Will the person I depend on be legally empowered to make decisions for me?
- Are these people willing and capable of taking on a caregiving role?
- Do I have reservations or concerns about hired care? If so, what are they?
- What must happen before I am willing to accept hired care?
- What traits, skills, or experience are important to me when selecting hired care?
- What is important to me when being cared for?
- What worries me most about being cared for?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

HOME

- Is it important for me to remain in my home as I age?
- Is my home suitable for aging? If not, can necessary home modification be made to support aging in place?
- Am I financially prepared to age in place?
- Which of the following home duties will I allow to be outsourced?
 - House Cleaning & Repair
 - Yard maintenance and snow removal
 - Washing & Folding Laundry
 - Grocery Shopping and Meal Preparation
 - Pet care
- Under what circumstances would I consider moving from my home?
- If I require assistance for activities of daily living, which ones would I accept in-home?
 - Eating
 - Bathing
 - Dressing
 - Mobility
 - Toileting
- If I were to move to a residential care facility, what three features are the most important to me?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

TRANSPORTATION

- What are my current transportation needs and limitations?
- Is my current mode of transportation suitable for my future changing needs?
- If I am no longer comfortable or confident behind the wheel, what will I do about transportation?
- Beginning at age 75, will I commit to periodically scheduling driving evaluations? If the evaluations outcomes limit my driving, will I communicate with my support to find suitable transportation alternatives?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

LONG TERM CARE PLANNING CONSIDERATIONS

- Am I aware of the potential costs of end-of-life care, such as hospice care, assisted living, or nursing home expenses? How will I fund my long-term care needs?
- Should I consider long-term care insurance to cover potential future care needs?
- Should I consider pre-planning and pre-paying for funeral or memorial services?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

FINANCIAL PREPAREDNESS

- If circumstances were to change in your ability to make informed financial decisions, are you clear on who you would trust to make them on your behalf and confident in their stewardship of capital and values alignment?
- Have you discussed your financial preparedness and end-of-life plans with your loved ones or a trusted advisor? Why or why not?
- Do you have a comprehensive inventory of your assets and liabilities, including bank accounts, investments, real estate, insurance, debts, and loans?
- Have you written down the names of your professional service provider team and how to contact them?
 - Financial Advisor
 - Estate Planning Attorney
 - CPA/Accountant
 - Other
- Have you made arrangements to protect your digital assets (e.g., online accounts, social media profiles) and pass on important digital information to your loved ones?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

ESTATE PLANNING CHECKLIST

- Have you established a will or trust to outline the distribution of your assets after your passing?
- Do you have a designated power of attorney to manage your financial affairs in the event of your incapacity?
- Have you appointed a healthcare proxy or established a living will to outline your medical treatment preferences?
- Have you reviewed and updated your beneficiaries on all applicable accounts, such as retirement accounts, life insurance policies, and investment accounts?
- Have you shared with your trustee, beneficiary, power of attorneys that you have named them and help them understand their responsibilities and your wishes?

Need Help?

Reach out to your Financial Partner or Family Office to learn more about the Care Coordination Program, powered by bQuest.

IN CONCLUSION

As you have ventured through this guide, you have embraced the journey of self-discovery and readiness, acknowledging that aging is an active endeavor that empowers you to shape your own destiny. By actively engaging in proactive planning and careful consideration of what truly matters to you, you have the ability to significantly enhance your experience of aging.

Moving forward, we encourage you to maintain a spirit of curiosity, continuous learning, and adaptable thinking.

Now, it is time to take a crucial next step by engaging in open and honest conversations. By actively involving your loved ones and seeking the guidance of professionals with invaluable expertise, you can create an environment of understanding, fortify your relationships, and ensure that your needs and desires are not only acknowledged but also respected and thoughtfully prepared for as you navigate your aging journey.

