



## Leave Nothing to Chance: Proactive Planning for Longevity

### Program Worksheet

The complexity of issues related to longevity make it hard for families to start the planning process. Our goal for this program is to provide a framework for organizing, addressing, and implementing the many tasks involved.

Please use this worksheet throughout the program to capture your thoughts and take-aways from each session. At the forum's conclusion, we will provide time for you to review these notes and identify some steps for tackling a few of your top priorities.

### Day One

#### **Session 1:**

#### **What's Involved? A Comprehensive Framework for Longevity Planning**

What do you need to start?

What do you need to finish?

What do you already have that just needs updating?

When was the last time you updated anything?

What has changed since you last updated?

Who could help?

What are your top three priorities you could address first?

#### **Session 2:**

#### **Tips for Discussing Aging Issues as a Family**

Are you ready to have a family discussion?



Is your family ready to have this discussion?

If so, what are the goals for this conversation?

Would a third-party facilitator make this easier or more productive?

What do you need to do/prepare in advance?

### **End of Day One:**

What are the biggest take-aways from today's sessions?

## **Day Two**

### **Session 1:**

#### **Making Choices and Documenting Decisions before They Are Needed**

What documents do you need to work on?

What decisions do you need to think about?

Who would you trust if you cannot make decisions for yourself?

Who do you need to inform about your documents and decisions?

### **Session 2:**

#### **Stories from the Front Lines: Perspectives on Aging Issues from Different Disciplines**

What are the likely or common scenarios you want to be prepared for?  
(either for yourself or a loved one)



What can you do to get more clarity about what you or a loved one would want for different potential situations?

### **Final Session:**

#### **From Hope to Action: Implementing Your Top Three Priorities**

What are the three most critical issues in your situation that need to be addressed?

Or...

What are the three easiest steps you can take to get started?

What actions will you take to work on these right away?

Who will you do this with?

What is your timeline goal for implementing on these priorities?

*The best time to plant a tree was 20 years ago. The second best time is...today.*

- Chinese proverb

**Start today.**