THE PROACTIVE AGING CHECKLIST

Stay Independent, Confident, and In Control

Your aging journey doesn't have to be reactive. By taking small, intentional steps now, you can maintain control, protect your independence, and live on your own terms.

Use this checklist to assess where you are today in each of the Four Pillars of Aging Readiness — and notice where a little more strategy could make all the difference.

🌟PILLAR 1: SUPPORT SYSTEM

Your support system is the foundation of staying independent and in control. These are the people who will step in when life shifts — by choice or by circumstance.

✅ CHECKLIST: Assess your readiness

- ☐ If something changed with your health tomorrow, who would know what to do first?
  (If you're not sure — that's a red flag.)
- ☐ Have you had a conversation with your "go-to" person about what being your support means?
  (It's not fair to assume — clarity creates confidence.)
- ☐ Do you have at least three people you could call today if something unexpected happened? Write them down.
- ☐ If family isn't nearby or available, do you know what a *professional support system* looks like — and when to bring one in?
- ☐ Does at least one person know where to find your essential information — doctor list, medications, legal documents, and emergency contacts?

💡 Reflection Prompt:

Most people don't realize how much easier aging becomes once they've clearly defined and communicated their support system. If you're unsure who fits where, or when to bring in professional help, I can help you build that strategy through the Openly Aging Collective or a private consultation.

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🏡 PILLAR 2: HOME ENVIRONMENT

Your home should work for you, not against you. The place you live can either promote your independence or quietly chip away at it. Most people don't realize how small design and location details can determine whether they can stay safely and happily at home.

✅ CHECKLIST: Assess your readiness

- ☐ Does your current home support your daily routines — or do stairs, layouts, or bathrooms make things harder than they need to be?
- ☐ If mobility or balance changed tomorrow, could you still navigate your home safely?
- ☐ Have you ever done a walk-through (alone or with a professional) to spot safety risks or simple improvements — like lighting, flooring, or bathroom access?
- ☐ If your home doesn't fit your future needs, do you know what your realistic options are — downsizing, remodeling, or moving to a community that fits your goals and finances?
- ☐ If your home does work, have you planned what it will take to maintain it — housekeeping, yard care, transportation, or emergency repairs — as time goes on?

💡 Reflection Prompt:

Your home is one of your biggest assets — but only if it continues to support your independence. If you're unsure how to make your current home work long-term or what other living options make sense for your situation, I can help you create a strategy that fits your goals and resources through the *Openly Aging Collective* or a private consultation.

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💰 PILLAR 3: SUPPORTIVE SERVICES

Supportive services are any resources you use to make daily life easier — whether paid privately, covered by insurance, or supported through benefits. These services aren't about giving up control; they're about *using your resources intentionally* to protect your independence.

✅ CHECKLIST: Assess your readiness

- ☐ Do you know what services are available to you — from home care and transportation to technology support, meals, or personal assistants?
- ☐ Have you reviewed what your insurance, long-term care policy, or veterans' benefits actually cover? (*Most people don't — and it's often more or less than expected.*)
- ☐ Do you know what you can comfortably afford to spend monthly on support without jeopardizing long-term stability?
- ☐ Are you delaying using services because you're afraid of "needing them later"? Or are you willing to use help *early* to stay independent longer?
- ☐ Are there daily tasks that have become harder — or ones you simply no longer enjoy doing — that could easily be delegated?
- ☐ Do you have a plan for how to find and vet reputable professionals when you're ready?

💡 Reflection Prompt:

Most people wait too long to use the resources they've spent years saving for. The right services, used at the right time, can add years of independence and quality to your life. If you're unsure where to start or how to align your care with your budget, I can help you create a personalized service strategy through the *Openly Aging Collective* or in a private consultation.

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❤️ PILLAR 4: SOCIAL CONNECTION

Staying socially connected is one of the strongest predictors of health and independence as we age. Your social world gives you purpose, accountability, and joy — but it often changes faster than we realize. Understanding how you connect today will help you stay connected tomorrow.

✅ CHECKLIST: Assess your readiness

- ☐ Do you know how you socialize — one-on-one, through activities, faith, volunteering, or clubs? (*Knowing your natural style helps you protect it.*)
- ☐ If you could no longer drive comfortably, how would you stay engaged with others?
- ☐ Do you have transportation alternatives or people you can rely on for rides when needed?
- ☐ Are your friendships and activities balanced — a mix of peers, younger people, and community?
- ☐ Do you have at least one regular activity on your calendar that brings you purpose or laughter each week?
- ☐ Have you considered how your social connections might shift if your health, mobility, or living situation changes — and how to plan for that now?

💡 Reflection Prompt:

Social connection doesn't happen by accident — it takes intention. Losing a driver's license, a spouse, or even a routine can quietly lead to isolation. Building a plan for how you'll stay connected ensures you keep purpose and joy at the center of your aging journey. If you're not sure what that could look like, I can help you design a personalized social connection strategy through the *Openly Aging Collective* or a private consultation.

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🌟 WHAT TO DO NEXT

Your checklist is the first step. The next step is *strategy*.
If you found gaps, uncertainty, or new questions in any of these areas, you don't need to figure it out alone.

Join the **Openly Aging Collective** — a supportive community where I share live discussions, expert interviews, and tools to help you stay ahead of the aging curve.
Or, if you're ready for personalized guidance, schedule a **private consultation** to build your own Aging Readiness Roadmap.

📍 Learn more at OpenlyAging.com
✉️ Follow along for weekly tips, encouragement, and expert insight on aging intentionally.