



“HOW PREPARED FOR LATER LIFE ARE YOU?” ASSESSMENT

This is a brief assessment of where you are in life right now. Things like - How organised are you? How happy are you? What do you want or need to consider as you get older? Be honest with yourself. Usually your first response is the right one.

Mark either **yes** or **no** next to each question.

HEALTH AND WELLBEING

1. Are you fit and healthy most of the time presently? Y N
2. Do you have a daily routine that supports your health and wellbeing? (Describe this.) Y N
3. Do you have a past medical history summary completed? Does your family know where it is? Y N
4. Are you aware of what medication or supplements you are taking and why? Y N
5. Are your family relationships all in good shape? Which are not? Y N
6. Do you know how to resolve upsets and misunderstandings effectively? Y N
7. Loneliness during old age is one of the main reasons for depression – do you have various ways to keep you happy and do you know what those are? Y N
8. Have you got a good support network about you to help you age gracefully? Y N



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FINANCES, LIVING CIRCUMSTANCES AND LIFESTYLE

1. Are you clear about how much money you need to live on each week or month and what your actual expenses are? Y N
2. Do you know some of the best places to keep your savings for different reasons? Y N
3. Have you planned what home modifications may need to be undertaken in the next 10 years so that you can continue to live at your present home? Y N
4. Have you worked out where you may need to move to if you cannot stay where you are? Y N
5. Do you know what you need to do in order to downsize successfully without major trauma? Y N
6. Are you aware of what possessions you have and what you need to keep as you get older that will serve you well? Y N
7. Do you know what questions to ask to let go of various possessions and how will you go about deciding what stays and what goes? Y N



LEGACIES, LEGALS AND WISHES FOR LIFE AND DEATH

1. Leaving a legacy for future generations can take various forms. For example - Do you have a story you would like to have recorded from your own life, and for whom? Y N
2. Have you passed on your experience and what you have learnt from your life to your family or friends? Do you know how to do this? Y N
3. Have you heard about a living will - and do you have one in place? This is also called an Advance Health Care Directive. Do you know how and where you want your funeral to take place? Y N
4. Have you written a Will and made provision for your family and friends and causes dear to your heart? Y N
5. Do you have Enduring Powers of Attorney in place for both your health and financial affairs? Did you know that without this being in place and enacted even your spouse cannot make decisions for you. (These are separate documents.) Y N



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GETTING ORGANISED FOR THE PRESENT AND FUTURE

- 1. Do you have your affairs in order and well organised so that someone else will be able to understand them? Y N
- 2. Some of your information will be needed by your family, some will be needed by whoever has to deal with your Estate after your death e.g. your Executor – how will you organise your life so that this is easy to accomplish? E.g. do you have all your passwords for different things written down somewhere or your financial affairs in one place? Y N
- 3. Have you thought want you want to achieve before you die? Some call it a “bucket list”.
Note: This may change over time depending on your ability. Y N
- 4. What is most important to you going forward? Do you know what you want to create in your life? (One way to identify this is to ask what worries you most if there is still work to do in this area!) Y N

There are 24 questions in this initial assessment.

Each question should give you either a yes or no answer (even if some have supplementary parts). Add them up. Total **Yes** Total **No**

So, how have you got on? /24 **yes** answers /24 **no** answers

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If you have got 20 Yes answers or more – many congratulations! You are well prepared for your old age and have only got a few more steps to undertake to help you live with freedom and ease. It also takes a lot of worry away from your family.

16-20 yes answers – good job so far. Working on those missing areas of your life will really help you to relax and enjoy your life much more. The areas that need working on are probably those that are the most challenging – not only mentally but also emotionally. By having some guidance and support in these particular areas your life could be much more rewarding and enjoyable.

10-15 yes answers – you need to do some serious work to get things sorted out. I suspect that you also need some guidance to help you get things organised and not feel totally overwhelmed and thereby not taking action. The Great Guidelines for Later Life course is perfect for helping you get things done and feel inspired to do so.

If you answered yes to **fewer than 10 answers** - it is time to stop putting your head in the sand by hoping that you aren't getting older or that you won't die – Taking a responsible approach to about many areas of your life will benefit both yourself and your family – and you will not need to worry about the future. Fear is paralysing and depressing and stops you living your life to the full. Also, although they may not tell you – by not being on top of things it is very worrying for your family and friends.



Great Guidelines for Later Life programmes resolve these and many other challenges in people's lives. The course components use modern technology to help to guide you through many sticking points, finding solutions and bringing peace of mind and freedom.



If you want to find out more about what is possible for you and your life please go to:

www.greatguidelinesforlaterlife.com

The most comprehensive one-stop-shop resource for all you need to know in relation to creating the best possible later years for you and your loved ones.