

Fast-Forward:

# Your Master Checklist

This checklist is meant to be your companion as you plan for your future and take control of the rest of your life. It's where you'll capture your ideas and decisions, and it's meant to be easily understood and shared with those you involve.

Everything from all three of our email courses will be captured here. Not sure you've taken all three? Go to [nextavenue.org/fast-forward](https://nextavenue.org/fast-forward)

**How to save this checklist:**

- Click the download button to download the checklist to your computer
- Locate the file on your device and rename it with a name you'll remember, like "My Next Avenue checklist"
- Move it to a folder where you can easily find it (Documents, for example).
- Open the file to begin filling it out
- Save frequently, and always before closing

# Assemble Your Team

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*Lesson One:*

## Find Your Team

Think about the different people and organizations you already know. Consider this a brainstorming session, and don't edit yourself too carefully. The point is to create options. We'll mine these lists of possibilities to answer the questions in later lessons.

Who do you see or talk to regularly?

Who — besides who you listed above — do you see or talk to occasionally?

If you woke up at 2 a.m. and needed help, who would you call?

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Lesson Two:

## Identify Additional Support

### My Organizations/Clubs

### My Local Area Agency on Aging

*Name:*

*Website:*

*Phone:*

Can you find other information websites, numbers, programs, tools or directories that could be useful? Be sure to note contact info and basic descriptions.

### My State AARP

Do you see any public benefits you'd like to take advantage of? Be sure to note website addresses, phone numbers and basic descriptions.

## More Resources

Using the categories below, are there any gaps in your list?

Google your city/county + one of the topics below (Example: Friendly visitor program + Louisville), and be sure to note contact information as well as descriptions.

*Caregiver services:*

*Home care:*

*Community/senior centers:*

*Meal assistance/delivery:*

*Legal/tax assistance:*

*Transportation assistance:*

*Friendly visitor programs:*

## Care Managers

Use the Aging Life Care Association's expert search, write down the name and contact information for at least three care managers you'd like to follow-up with.

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*Lesson Three:*

## **Money Management Support**

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List your top choices for your financial power of attorney.

### **Additional Steps**

Write down some key points from the Next Avenue articles and next steps to determine your long-term plans and needed documents.

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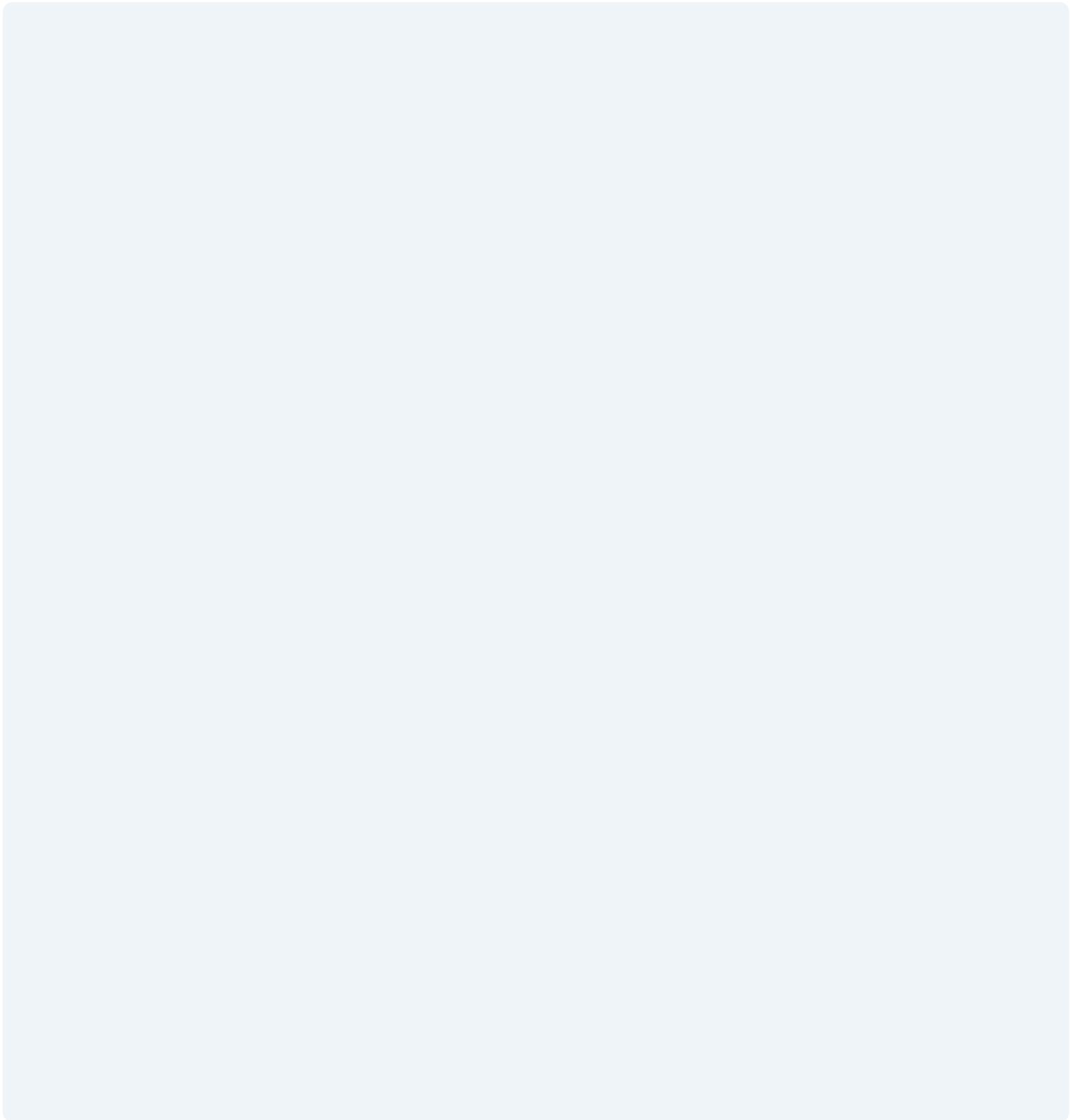
Lesson Four:

## Personal Care

### Personal Care Support

List people or resources that make the most sense for assistance with these types of common tasks:

- Housecleaning
- Laundry
- Dressing
- Bathing
- Grooming
- Hygiene
- Toileting
- Medication assistance
- Shopping
- Meal preparation
- Paying bills
- Home repairs and maintenance
- Lawn care
- Pet care



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*Lesson Five:*

## Getting Around

### Transportation Support

Which people or outside resources would be good candidates for helping you get to appointments, the grocery store, etc.?

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*Lesson Six:*

## Your Physical Health

### Health Care Power of Attorney

Who would be your top choice and backup in the event you need someone to make medical decisions for you?

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Lesson Seven:

## Your Mental Health

### Social Activities

With your health as it is now, what are the social activities — in person or virtually — you will participate in?  
(Examples: poker club, weekly yoga class, religious/spiritual practice.)

### In-Home Social Activities

If your health limited your ability to socialize outside of the home, what activities could you still participate in, seek out or bring in?

### Confidant(s)

Who you trust to confide in if you're down or struggling? List as many as you can think of — there may be different people for different things!

### Counseling Support

If you have a current or former counselor or therapist you like, list them here. If you don't, list potential resources (such as people you know who have therapists or counseling centers) that would help you find one in the future.



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*Lesson Three:*

## Reaching Out

Just a reminder: Be sure to check the boxes in the “Scheduled” column once you’ve done so with each person.

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*Lesson Four:*

## Having the Conversations

Once you’ve scheduled your conversations, it’s time to think about how to begin the discussion when the time comes.

Here are some examples from The Conversation Project — a terrific resource for having conversations like these:

### Conversation Starters

- I’ve been thinking about who I’d like by my side as I get older. Can I tell you about it?
- Even though I’m OK right now, I’m worried that \_\_\_\_\_, and I want to be prepared.
- I was thinking about what happened to \_\_\_\_\_, and it made me realize...

**If you have other ideas for your own way of saying things, here’s some space for notes:**

# Complete an Advance Directive

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*Lesson One:*

## What's a Living Will?

A living will is an advance directive that details which medical treatments you do and do not want if you're unable to speak for yourself. Think of it as a guide for your support team of family, friends and doctors who are caring for you.

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*Lesson Two:*

## The Decisions

### Reflection

These questions are designed to help you capture your thoughts and personal values regarding treatments you would or wouldn't want in a medical emergency:

**Is your main desire to have the most days of life, or would you rather focus on quality of life?**

At the end of your life, would you want medical treatment only if a cure was possible? Or would you want treatment to extend your life in all situations?

### Treatment Preferences

Reflect on if, and when, you would want CPR or a defibrillator used:

Reflect on if, when and for how long you would want to be on a ventilator:

Reflect on if, when and for how long you would want to be on artificial nutrition/hydration:

Reflect on if, when and for how long you would want to be on dialysis:

Do you want to donate your organs and tissues to scientific study?

Do you want your entire body donated to scientific study?

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*Lesson Three:*

## **Making Things Official**

Remember to download and save a copy of your advance directive (living will) form to your computer once it's complete. And, ideally, print several copies.

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Lesson Four:

## Sharing and Storing Your Living Will

I have completed my living will on day/month/year:

I have signed (and notarized if necessary) my living will

I have given a copy of my living will to at least one person

I have given a copy of my living will to my doctor

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I will review my living will on this day/month/year:

I have marked that date on my calendar

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A copy of my living will is located here: