

LIFE

IN

MOTION

A GUIDE

FOR GATHERING LIFE'S
VITAL INFORMATION

KAREN PURZE

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STAGES OF AGING: HOW TO PREPARE

Everyone ages differently but there are some common scenarios. Here's what to do to better prepare for change as your parents age.

STAGE 1: YOUR PARENTS ARE FULLY INDEPENDENT

- ◆ **Make sure your parents have a current [estate plan](#).** It can be hard to bring up, but any conversations about the future that you have now will save time and stress as things change. (I've got some conversation tips [in this blog post](#).)
- ◆ **Get to know your parents' neighbors and friends.** If your parents have invested in their relationships, you may be able to reach out to their friends or neighbors down the line — if you know who they are and how to reach them. Make it a point to get to know the other important people in your parents' lives.
- ◆ **Help them downsize.** If they're open to the discussion, this is a good time to help your parents figure out a long term housing plan. (But don't be surprised if they're too busy to think about it.)

STAGE 2: THEY DON'T THINK THEY NEED HELP (BUT THEY DO)

- ◆ **Consider your role.** What kind of help do your parents want from you? How much are you willing (or able) to help? Your parents can stay in this stage a *long* time (maybe forever), with your help. That's fine, as long as everyone is in clear agreement about your role and your limits.
- ◆ **Research options for getting additional help at home.** You can figure out what options are available, with or without your parents' involvement. Talk to some local [home care agencies](#) or [independent care managers](#), see if there are any community organizations that offer assistance at home, and/or call your [local area agency on aging](#).



STAGE 2 (CONTINUED)

- ◆ Understand their financial situation. Figuring out what kind of help to get depends a lot on their finances, so try to talk about this as a family. Sometimes that's easier said than done, but it's necessary. One path into this conversation might be to offer help automating their bill payments or [organizing their financial information](#).

STAGE 3: YOUR PARENTS DON'T NEED ENOUGH HELP

- ◆ **Evaluate home safety.** Reduce the risk of falls or injuries by helping them make some changes to their home. AARP has some simple low-cost tips in [these guides](#) — think about things like improving lighting, adding grab rails, and removing tripping hazards. The safer your parents' home is, the longer they can stay there.
- ◆ **Anticipate the next level of care.** Who will you rely on if and when your parents are ready for more help at home? Will they need to move? Can they afford to move? Think about next steps, even if your parents aren't ready to take action. Do what you can to be ready if or when things change.
- ◆ **Take a look at property.** Are there things your parents don't need or use anymore? This is a great time to sell unused property or vehicles or declutter the house. They may not agree, but it's worth a try. If you encounter resistance, be patient and don't give up! It may take several attempts to get them to see it's in their best interests.

STAGE 4: YOUR PARENTS NEED DAILY HELP (AND THEY HAVE IT)

- ◆ **Reconsider your role.** Is there a point at which you won't be able to provide the kind of help you're providing today? Where is "the line" for you, and what's next when you get there?
- ◆ **Reevaluate housing options.** If you anticipate there will come a time when your parent(s) can't stay at home, it's time to consider other housing options. There are a lot of choices to make, and the more time you have to think about it and discuss, the better.
- ◆ **Simplify.** What can you do to help simplify your parents' life? Are there things that cause them stress that can be taken off their plate?



STAGE 4 (CONTINUED)

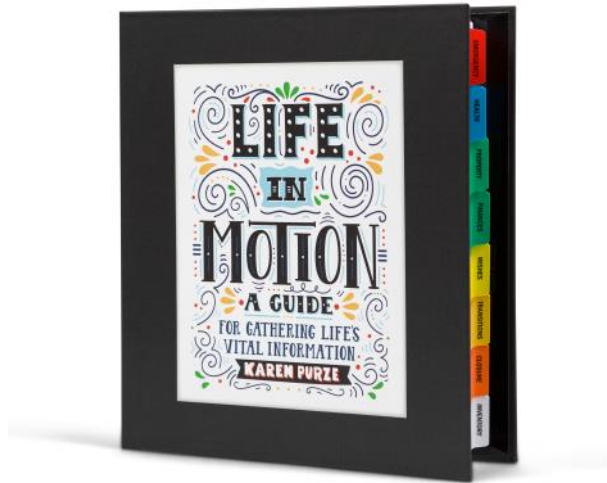
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- ◆ **Simplify.** What can you do to help simplify your parents' life? Are there things that cause them stress that can be taken off their plate?
- ◆ **Prepare for a medical emergency, if you haven't already.** Know what medications your parents take and be [prepared to share that information](#) with medical professionals.

STAGE 5: YOUR PARENTS NEED MEDICAL HELP

- ◆ **Consider a move.** If you can't afford or find medical help at home, it may be time to move to a community that has skilled nurses on staff.
- ◆ **Figure out how to get a break.** If you're doing this yourself, you may be feeling overwhelmed. Know this: you can't do it all, and you can't do it alone. Invest the time to identify ways to relieve your stress (and don't let anyone tell you what that should look like.)

STAGE 6: YOUR PARENTS NEED FULL-TIME HELP

- ◆ **Talk about final wishes.** Try to have a conversation about how their care decisions should be made at the end of their life, and how they want their lives celebrated.
- ◆ **Locate important documents.** My dad was proud of his military service and requested military honors at his memorial service. If we hadn't ordered a copy of his military service records ahead of time this would have been a difficult request to honor. There are [many important documents](#) you'll need if and when your parents die; see if you can find them (or order copies) before you need them.
- ◆ **Understand the estate settlement process.** I cover the estate settlement process in this post outlining key [steps to take if you are the executor of the estate](#).



Life in Motion is a guided workbook to help you get personal information organized so it's ready when you or your family need it.

It has all the forms, checklists, and document inventory sheets you need to quickly record your most important personal information:

- ◆ Emergency Plans
- ◆ Personal Health Record
- ◆ Property Information
- ◆ Financial Assets (and Liabilities)
- ◆ Final Wishes

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