

# Aging Self-Reflection

You can use or share this short questionnaire to self-reflect on how aging may be impacting your lifestyle, health, and finances. Considering these questions can help you to evaluate when and whether it's time for change, as well as facilitate open conversations with loved ones.



## Lifestyle and Daily Activities

- Do you feel safe moving around your home without assistance?
- Is your home properly equipped and located to accommodate your needs or limitations?
  - Are you able to keep up with household chores and maintenance?
  - Have you had any recent close calls or accidents while driving?



## Health and Wellness

- Have you noted any changes in your strength, balance, or coordination?
  - Do you feel overwhelmed by tasks that were once easy for you?
    - Have you had your hearing and vision checked recently?
    - Are you experiencing feelings of loneliness or isolation?



## Financial Health

- How long has it been since you created or updated your estate planning documents?
- Have you noticed any changes in your spending habits or difficulty managing day to day finances?
  - Are you aware of the financial indicators that could signal cognitive decline?



## Planning for the Future

- Have you acknowledged that you will likely face future health and financial challenges?
  - Have you discussed your wishes with your executor trustee, POAs, and loved ones?
- Are you prepared to make lifestyle changes, like downsizing or getting extra support, if needed?

A TIME  
TO PLAN.

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