HOW PROFESSIONALS CAN USE

Planning Ahead

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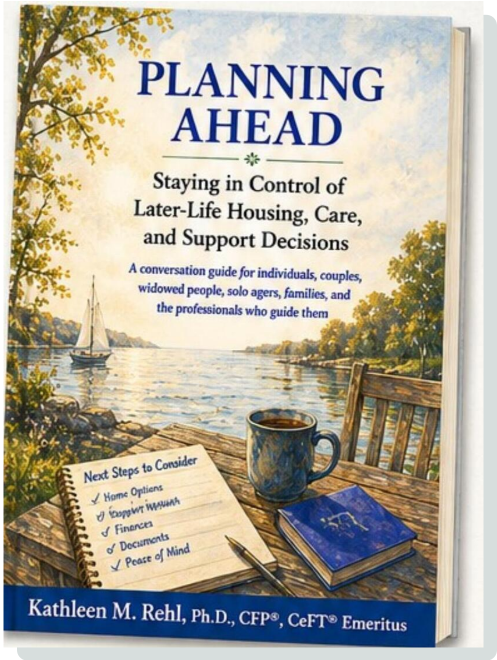

Practical ways to use this eBooklet in conversations with individuals and families about later-life housing, care, and support.

Planning Ahead helps people and families begin earlier, compare options, and discuss future support needs before circumstances become urgent.

READ OR SHARE THE EBOOKLET

Scan the QR code or use the direct website address:

www.kathleenrehl.com/articles/planning-ahead

1 WHY THIS GUIDE HELPS

- Clarifies priorities such as independence, safety, connection, affordability, flexibility, and peace of mind.
- Compares trade-offs across housing, care, and support options.
- Opens calmer conversations before urgent circumstances narrow choices.

2 BEST TIMES TO INTRODUCE IT

- During retirement, downsizing, or relocation planning
- With individuals, couples, widowed people, solo agers, or blended families
- When trusted helpers are becoming involved
- After health changes, caregiving strain, or questions about future support

3 A SIMPLE PROFESSIONAL PLAYBOOK

SHARE THE EBOOKLET
Send it before or after a meeting.

START WITH PRIORITIES
Use three or four planning lenses that matter most now.

COMPARE THE TRADE-OFFS
Discuss cost predictability, care coordination, family impact, and flexibility.

END WITH ONE NEXT STEP
Choose one manageable action for the coming month.

4 CONVERSATION STARTERS

- What matters most to you - independence, safety, connection, simplicity, affordability, or predictability?
- If your needs changed, who would be most likely to notice first?
- Whom would you want to coordinate support or speak on your behalf if needed?
- How should housing, care, support, and decision-making work together?
- What concerns you most - and what would give you greater peace of mind?

HELPFUL PAGES TO USE

p. 4	p. 7	p. 10	p. 11
Seven Planning Lenses	Comparison Chart	Conversation Starters	Ten Starting Questions

THE GOAL

Begin early, preserve choice, and help people make better-informed decisions over time.

HOW PROFESSIONALS ADD VALUE

See the whole person, reveal planning gaps, support family conversations, and coordinate with other professionals when appropriate and with the individual's permission.

Sample Email for a Client or Family

Subject: A helpful guide for planning ahead

Dear [Name],

I am sharing a complimentary eBooklet that may help you consider future housing, care, and support decisions in a calm and practical way.

These are normal planning topics to consider as part of retirement and post-retirement planning. Bringing them up does not mean that a change is expected. It simply gives us an opportunity to think ahead while there is time to explore options, clarify preferences, and make informed decisions.

Planning Ahead: Staying in Control of Later-Life Housing, Care, and Support Decisions is designed to help individuals and families clarify what matters most, compare possible options, and begin conversations with family members, trusted helpers, and professionals who may be involved later.

The eBooklet does not ask you to make any decisions now. Instead, it offers practical questions and a comparison framework to help you consider:

- where and how you would prefer to live
- who might help if your needs changed
- how care and support could be coordinated
- how different choices might affect family members
- what financial and legal information should be organized

You can read the complimentary 12-page eBooklet here:

www.kathleenrehl.com/articles/planning-ahead

As you look through it, you may find it helpful to note any questions, concerns, or sections you would like us to discuss at our next meeting. We do not need to address everything at once. One useful conversation or one manageable next step can be a valuable beginning.

Warmly,
[Your Name]
[Title / Firm]
[Contact Information]

Optional personalization

You may want to add a sentence explaining why you are sharing the eBooklet now - for example, following a retirement-planning meeting, an estate-plan review, a discussion about long-term care, a health or caregiving change, or a conversation involving adult children or other trusted helpers.

Optional Follow-Up Language and Meeting Questions

Helping the Conversation Feel Natural

After sharing Planning Ahead, the professional may use language such as the following to make the conversation feel calm, routine, and manageable:

> I hope you found the eBooklet useful. You do not need to complete every page or have answers to all the questions. I would simply like to hear what stood out to you.
>
> These are normal topics to consider as part of retirement and later-life planning. We are not assuming that a change is needed. We are making sure your preferences are understood and that you have time to consider your options.
>
> It is fine if you have not reached any conclusions. Sometimes identifying the questions that still feel unclear is the most valuable first step.
>
> We can focus on one or two areas today and return to the others over time.

If the individual or family has not yet read the eBooklet:

That is not a problem. We can look at one section together and begin with the question that feels most relevant to you now.

If family members or trusted helpers may eventually be involved:

Would it be helpful to include someone you trust in a future conversation so that the person better understands what matters to you?

Five Questions for the Next Conversation

One or two questions may be enough to begin a meaningful discussion.

1. **What stood out to you as you reviewed the eBooklet?**
   This lets the person begin with the issue that feels most important, surprising, or unresolved.

2. **Which priorities matter most right now - independence, safety, connection, affordability, predictability, flexibility, or peace of mind?**
   The answer helps reveal how the person may evaluate future housing, care, and support choices.

3. **If your needs changed, who would be most likely to notice first? Whom would you want to help coordinate support?**
   This moves the discussion from where the person may live to how daily help, communication, and advocacy might work.

4. **Which possible trade-offs concern you most?**
   Consider familiarity versus built-in support, lower costs now versus predictability later, or independence versus family responsibility.

5. **What is one manageable step you would feel comfortable taking now?**
   A next step might be gathering information, reviewing documents, talking with family, or exploring a housing option.

A HELPFUL CLOSING: We do not need to solve everything today. The goal is to begin early, keep your preferences at the center, and choose one useful next step.

Educational use: Planning Ahead and this Professional Use Guide are conversation aids, not substitutes for individualized financial, legal, tax, medical, or care advice. Professionals should use judgment and work within their areas of expertise.

 | Sharing and permissions information appears on page 1.