



# TULLY LAW GROUP

ELDER CARE AND ESTATE PLANNING

HONOR & PROTECT

## September is Healthy Aging Month!

Take 5 minutes to complete this Healthy Aging Checklist. Use it as a tool to identify areas in which you can improve your quality of life and where you may need some additional assistance.

This is not medical or legal advice and should only be used for informational purposes.

### Health

Rank yourself on a scale of 1 to 3, with 1 being not good and 3 being the best

	Score
Attending regular and follow up doctors appointments as needed	
Participating in preventative health care and routine screenings	
Eating a well-balanced diet	
Getting the appropriate amount of physical activity	
Controlling weight	
Participating in activities to promote mental and emotional health	
Avoiding tobacco	
Drinking in moderation	
Keeping socially connected	
Remaining interested in life and hobbies	
Able to generally maintain a positive attitude	
Sub-total score	

**Legal**

Score 1 point for each document completed and up to date

	Score
Health Care Proxy	
Living Will	
Last Will & Testament	
Modified Durable Power of Attorney	
Guardianship for minor children if applicable	
Revocable Trust	
Medicaid Asset Protection Trust (Irrevocable Trust)	
Sub-total score	

**Activities of Daily Living**

Rank yourself on a scale of 1 to 3, with:

- 1 being "cannot do"
- 2 being "with help"
- 3 being "by myself"

	Score
Bathing	
Dressing	
Transferring from bed to chair	
Walking	
Feeding self	
Using the toilet	
Grooming	
Walking up & down stairs	
Sub-total score	

### Instrumental Activities of Daily Living

Rank yourself on a scale of 1 to 3, with:

- 1 being “cannot do”
- 2 being “with help”
- 3 being “by myself”

	Score
Using the phone	
Driving / Getting transportation	
Grocery shopping	
Preparing meals	
Doing housework	
Doing laundry	
Taking medications	
Paying bills / Managing money	
Sub-total score	

**If you scored between 88 - 64**, you’re in great shape! Continue doing what you’re doing!

**If you scored between 63 - 50**, you should consider an **Elder Care Protection Plan**. You may have worked hard to build a nest egg in the hopes that it will provide a comfortable lifestyle for your future and allow for financial security. However, if you or your spouse need long-term care, your savings and investments might not be adequate. An Elder Care Protection Plan will allow you to set up an irrevocable asset protection trust, as well as your other critical estate planning documents, that will assist in qualifying for long-term care that is paid for by Medicaid, as you continue to age.

**If you scored below a 50**, please consider reaching out about a **Life Care Plan**. This unique service combines the asset protection of an Elder Care Protection Plan, with long-term care Medicaid benefits and Care Advocacy, offering a comprehensive approach that helps families with every aspect of caring for someone with a chronic illness. We make sure that you or your loved one gets good health care, at home, in an assisted living facility or in a nursing home. Your Life Care Plan is focused on you achieving your best quality of life, taking into account your health, safety, physical and emotional well-being. We help you make decisions relating to your health care, special needs, and long-term care planning. We also partner with you to ensure that the decisions you make are carried out according to your wishes and best interests. We help you develop a plan to pay for the best health care for you while protecting the most assets possible.

For more information, please contact us at 631-424-2800 or [info@tullylawgroup.com](mailto:info@tullylawgroup.com).