



SAN MATEO COUNTY HEALTH

AGING & DISABILITY SERVICES



Aging Readiness Checklist

Development and research for this list was completed by the Aging Readiness and Family Caregiver Support Committee of the Commission on Aging for San Mateo County.

Take the time to reflect on each question and how it may apply to your aging process, as everyone's aging experience is different and unique. Planning and preparation can support your aging process in a positive way.

Financial Wellbeing

- Do you have a financial plan?
- What are your everyday needs, cash flow, debt, utilities, taxes, and social activities?
- Where do you plan to age (e.g., home, facility)? Consider the costs involved.
- Have you designated someone to handle your financial affairs if you become unable (e.g., POA, executor)?
- Do you have a written will/trust?
- Have you created a transition plan and discussed it with the relevant individuals?

Physical Wellbeing

- What actions are you taking today to ensure future independence?
- Do you engage in physical activity at least three times a week?
- Are you maintaining regular check-ups with a physician to preserve your health?
- Are you integrating balance, strength, and cardio exercises to prevent falls?
- Have you completed an advanced healthcare directive and discussed it with involved individuals and your primary care physician?

Spiritual

Reflect on your inner self with these prompts:

- What spiritual practices bring you peace?
- How do you connect with your inner self?
- Are your end-of-life wishes documented and shared with relevant individuals?



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Mental/Cognitive Health

- Do you know your genetic predisposition to cognitive/brain conditions?
- Have you requested a cognitive test from your doctor?
- What daily activities help you maintain cognitive/brain health?
- Are there mental health challenges to consider in your aging plan?
- How do you care for your emotional and mental health needs?

Social

- Do you have meaningful social connections?
- Have you identified family/friends to support you through your aging experience?
- What activities do you enjoy, and do you have someone to share them with if desired?
- Have you identified individuals for emergency contact for physical, emotional, or spiritual support?

Disclaimer

This checklist is for general informational purposes only and is not medical, legal, or financial advice. It is not an all-inclusive list and may not fit every situation—please consult qualified professionals (e.g., your health care provider, attorney, or financial advisor) for guidance specific to your needs.

Research was completed through organizations such as AARP, National Council on Aging (NCA), Elder Economic Index, California Master Plan on Aging, and more.

For additional information, please visit the following websites:

Office of Disease Prevention and Health Promotion:

odphp.health.gov/our-work/national-health-initiatives/healthy-aging

National Institute on Aging:

<https://www.nia.nih.gov>

Master Plan for Aging:

<https://mpa.aging.ca.gov>



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