the

AGING WELL WITH INTENTION

Blueprint & Workbook

A step-by-step framework designed to help you plan for the future with clarity, confidence, and purpose. It guides you through evaluating your current situation, exploring options, organizing key documents, and building a strong support network so you can age on your own terms, not by default.

A LOOK INSIDE

JANA ADAMS

From Caregiver to Guide: Why This Workbook Exists

I didn't set out to become an expert in senior transitions. Life just kept teaching me, and I kept paying attention.

Before I ever sat across from a family trying to figure out what comes next with their parents' home, I was that family. I was the daughter. The sister. One of the family members who stepped up when things got hard and stayed in when they got harder. And for years before that, I became my daughter's caregiver, her care manager, her medical decision-maker — the person who showed up to every appointment, learned every medication, and fought for every resource she deserved.

My daughter has complex medical needs, and our journey was not a quiet one. The challenges we faced navigating systems that weren't designed to make it easy were featured on NBC's Today Show and covered by national and regional media. I never set out to be an advocate. I set out to take care of my child. But once I found my voice in those systems — fighting for dignity, for resources, for the right to be heard — I couldn't stop. And I haven't. That same drive carried me from my daughter's care team meetings into the broader world of seniors, families, and life transitions, where I found the same gaps, the same overwhelm, and the same need for someone to help people find their way through.

Before my focus fully shifted to seniors, I was already deepening my professional knowledge. Training as a Trust and Probate Specialist opened my eyes to how often families arrive at the end of a loved one's life completely unprepared — legally, financially, practically. That training sparked a desire to do more, learn more, and serve families earlier in the process, before the crisis arrived.

Then I attended a Senior Transition Specialist conference in St. Louis. While I was in the area, I made a trip to visit my parents in Missouri. They were doing well. Really well. It was a good visit. Three months later, everything changed.

My dad's health shifted fast. What followed was one of the hardest years my parents had ever walked through. Hospitalizations, and in between them, a constant stream of decisions no one was fully prepared to make. If he couldn't come home, where would he go? What would that mean for my mom? Were the therapies helping him, or were they becoming more burden than benefit? With his dementia progressing, had my parents been able to talk through all of it together while there was still time?

My family had some things in place, and that helped. But there were still decisions that had to be made in real time, under pressure, with nine siblings doing their best from wherever they were. Ultimately, the clearest path forward was for my parents to move in with my oldest sister. It was the right decision. Getting there still took everything the family had.

My dad passed about a year after things first started to change. When it was over, the grief wasn't the only thing left behind. There were logistics, decisions, and paperwork — a long list of things that needed attention at the exact moment when everyone was running on empty.

Returning home, I channeled that experience into purpose. I went deeper into the Regional Center system, training as an independent facilitator and learning person-centered planning — a framework built on a simple belief: every person, regardless of age or ability, has the right to be part of the decisions that shape their own life. Just last year, I earned my Certified Senior Advisor designation, bringing together everything I had learned as a caregiver, an advocate, a Trust and Probate Specialist, and a real estate broker working daily at the intersection of aging, housing, and care.

That's what I don't want for your family — the scramble, the overwhelm, the years spent managing a crisis instead of being present for the people you love. Aging doesn't have to be something that happens to us. It can be something we plan for, thoughtfully, intentionally, even joyfully.

This workbook and the workshop series that accompanies it exist to help answer those questions. Planning doesn't remove the hard parts of life. But it removes so much of the unnecessary hard. When wishes are written down, resources are in place, and roles are clear, you get to just be present — a daughter, a son, a spouse, not just a decision-maker in the middle of a crisis.

This workbook is the map I wish my family had. You're here because you care. Now let's build a plan that makes sure that care is sustainable, supported, and surrounded by everything you and your family need.

Let's get started. — Jana Adams

Certified Senior Advisor (CSA®) · Trust & Probate Specialist · Broker Associate, LPT Realty

THE FRAMEWORK

The BLUEPRINT Method

Nine simple moves that carry you from reflection to action — the same framework that shapes every section of this workbook.

B — **Begin with Awareness**
Reflect honestly on where you are now — your home, your health, your lifestyle. This is your foundation.

L — **Look at the Fit**
Reevaluate your current living situation: is your home safe, supportive, and sustainable?

U — **Understand Your Options**
Explore what's possible, from aging in place to care communities, and what fits your goals.

E — **Evaluate Needs & Non-Negotiables**
Identify what truly matters to you: independence, location, finances, and long-term care planning.

P — **Prepare Your Paperwork & Plans**
Organize essential documents and appoint trusted decision-makers. Planning brings peace of mind.

R — **Rally Your Support Circle**
Map out the people and professionals you can count on, and who you may want to add.

I — **Initiate Actionable Steps**
Break down your next 90 days into simple, achievable goals. Progress over perfection.

N — **Navigate Emotional Changes**
Acknowledge fear, grief, and hope. Make space for your feelings and get the support you need.

T — **Take Charge of What's Next**
Own your aging journey with confidence. Set a goal, tell someone, and move forward with clarity.

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Plus a glossary of senior-care and estate terms, an important-contacts directory, and room to write throughout.

KEY POINTS

What you'll work through

SECTION 01

Setting Your Vision

- Decide how you want to live as you age, from hobbies and travel to where you'd most like to be.
- Use the Five-Quarter (5Q) Life Framework to see which stage you're in and what would make it more fulfilling.

SECTION 02

Building Your Circle of Support

- Learn the four types of support: emotional, informational, practical and financial.
- Map the people and professionals you can count on today, and who you still want to add.

SECTION 03

Evaluating Your Current Living Situation

- Score your home on safety, upkeep, cost and closeness to family and care.
- Spot the improvements your home may need before they become urgent.

SECTION 04

Tax Planning and Financial Sense

- List your income, expenses, assets and the documents to gather and keep current.
- Understand stepped-up basis and how Prop 19 changed property-tax transfers for California families.

SECTION 05

Downsizing and Decluttering for Simplicity

- Break a whole house into small projects: keep, donate or sell, and discard.
- Keep the memories without keeping everything, and know when a move manager can help.

SECTION 06

Exploring Future Housing & Care Options

- Compare your choices, from aging in place and co-housing to 55+ communities and assisted living.
- Weigh cost, independence and location so the next move is a decision, not a reaction.

What you'll work through

SECTION 07

Estate Planning & Legal Documents

- Get organized: the documents your family will need and where to keep them.
- Walk through trust basics step by step, from choosing a trustee to funding the trust and avoiding probate.

SECTION 08

Health & Wellness

- Know the difference between normal aging and changes worth a doctor's visit.
- Record your baseline, recommended screenings and the habits that protect brain health.

SECTION 09

Future Living, Care Needs & Safety

- Run a home-safety and care-needs checklist, and set up a plan for what to do after a fall.
- Learn how placement and referral services help when more care is needed.

SECTION 10

Legacy

- Decide what you want to pass on, beyond money: traditions, recipes and words of wisdom.
- Choose how to share your story and what role you want family to play in your plans.

SECTION 11

Preparing for Change

- Make room for the feelings that come with change: fear, grief, relief and hope.
- Learn how private care managers and hospice can support you and your family.

SECTION 12

Your 90-Day Action Plan

- Turn everything into one simple step each to Organize, Simplify, Plan and Connect.
- Set your top three priorities, tell someone you trust and check in monthly.

YOUR COPY

Ready to build your plan?

The full Blueprint & Workbook guides every Aging Well With Intention series, with room to write, reflect and decide at every step.

- 12 sections built on the BLUEPRINT Method
- Questions to consider, check-ins and hands-on activities in every section
- Real stories from Sonoma County families, and the lessons they learned
- Checklists, an important-contacts directory and a plain-language glossary

Included with every series

$59 covers your printed workbook and all class materials. Pick it up at check-in on the first day of class.

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