



Vibrant Living Self-Assessment

Assessment Scoring Instructions:

Rate yourself for each statement by putting a number in the Score area of the table. When your answer is "YES" to a statement, give yourself 5 points. When your answer is "NO" to a statement give yourself 0 points. When your answer is "I DON'T KNOW" to a statement give yourself 0 points. When your answer is "I am working on it" give yourself 3 points. Then total all of your points for each of the sections and record them in the Total areas, then add together the Totals from all of the sections to get your final TOTAL.

If you have any section/s where your score is 0, these are the areas you really need to work on for the best quality of life as you age. Focus on making improvements so that you can answer yes to as many of the questions as you can.

A perfect score is 280. If your score is less than 100 points, you have some work to do. Focus on gaining information and taking action, so that you can answer yes to more of the questions. If your score is between 100 and 150 you are doing pretty well but keep working on things until your score is between 170 to 230. This is the optimum score range for avoiding living in crisis mode and living the best quality of life as you age. If your score is higher than 230, congratulations you are living life vibrantly on your own terms and set to finish this life strong!

Health & Wellness

	Answer	Score
I have a team of health professionals that I can talk to when making important health decisions		
I drink half my body weight in ounces of water every day (150 lbs = 75 ounces of water)		
I am active and I keep moving every day		
I am focusing on cutting sugar out of my diet so that my body gets its energy from burning fat		
I eat a lot of fruit and vegetables, nuts and legumes/beans		
I eat and drink fermented foods and drinks on a regular basis and/or I take a probiotic regularly		
I know what the Vitamin D levels in my blood are and I take the appropriate measures to keep them where they need to be		
Total:		



Estate Planning

Answer

Score

I have done a Trust to protect my assets from probate, or a Will, so that my assets will be distributed the way I desire		
I have done a Financial and Medical POA, and the appropriate people have copies and understand what I want medically and financially		
I have updated my Trust or Will, and I do so whenever there are life changes that are important		
I have done a Living Will (Advance Directive) and it is readily accessible to doctors digitally in case of an emergency or if I am taken to the hospital		
I have taken the appropriate steps to fund my Trust and I have made sure that any new assets acquired have been put into the trust (does not apply to a Will)		
Total:		

Financial/Tax Planning

Answer

Score

I know that my money is creating the maximum benefit for me and the highest efficiency		
I have confidence that I am not taking on too much risk, and my money is safe for retirement		
I know what it costs for me to produce my retirement income		
I understand that Longevity is one of the biggest risks in retirement and I am prepared for it		
I know how much money I will need each year, and I know how long my money will last		
I know what the Tax Torpedo is, and I have taken steps to avoid paying too much in taxes, as I receive Social Security and take distributions from my retirement accounts		
Total:		

Housing & Aging in Place

Answer

Score

The home I am living in is the home that I want to stay in for as long as possible as I age and if not, I am thinking of moving, sooner than later		
I keep the clutter cleared from my home and I am organizing and getting rid of what I don't need		



I am aware of all of the things I can do to improve the features of my home so that I can safely age in it no matter what my abilities		
I am making a plan to start making those improvements		
Total:		

Mobility

Answer

Score

I move around doing things frequently throughout the day, I do not sit for longer periods than a couple of hours		
My day generally involves stretches in the morning and evening		
I do strength training 3 times a week		
I am confident that I can improve my mobility if I decide to focus on it		
I know what the 6 Activities of Daily Living are and I think about ways that I can keep myself performing them as I age		
Total:		

Care Planning & In-Home Care

Answer

Score

I know who will help me when I begin to need help with the activities of daily living (family and/or a professional), and we have discussed my expectations		
My care will be provided to me when I begin needing assistance and I will make the decisions based on predetermined criterion that I have set for myself		
I have a solid plan for how I will pay for my care, and/or for assisted living		
Total:		

Social Security & Medicare

Answer

Score

I know how to optimize my Social Security		
I am aware that my spouse will have to live on much less if I pass away before he/she does, and I have a plan for this		
I have done a plan so that I am not affected by the Tax Torpedo when it comes to taking my Social Security Benefits		
I have the best Medicare plan for my needs, and I re-evaluate my coverage yearly		



I know that Medicare does not cover long-term care		
Total:		

Technology

Answer

Score

I am comfortable with my abilities to protect myself on the web and on my cell phone		
I can do what I need to be able to do on my phone or my computer		
I am aware of the technology available to keep me safe and to notify family should I have a problem		
I know about and am familiar with the different types of scams and how to avoid them		
Total:		

Insurance

Answer

Score

I know what insurance products I have, the benefit they provide and when to use them		
I have educated myself about the new long-term care products (long-term care, life, annuity) that can leverage my money for long-term care, and the improvements over the old products		
I have enough insurance so that should I pass, my family will be able to continue living the same lifestyle they had when I was still alive		
I know what living benefits are and how they can benefit me		
I understand the value of "leveraging the value of certainty"		
Total:		

Family

Answer

Score

I have been clear about what I want for my aging, how I want to be treated and what is important to me		
I have started making plans for when I might need some help so that I have more control, and my family doesn't have to figure everything out while they are dealing with stressful circumstances		



I am making important decisions today, and discussing them with my family so that everyone is clear about my wishes and so there will be less trauma when I pass		
I am spending time thinking about what I want to leave to my loved ones of my personal items when I pass, and I am discussing this with each family member individually		
Total:		

Community

Answer

Score

I spend time with friends on a regular basis and we discuss our aging and support one another		
I am focused on building social capital by joining groups to do activities, meeting my neighbors and taking up hobbies		
I volunteer in my community and/or I do things for others in need		
If I think of something that can improve my community, I make an effort to let the appropriate people know		
Total:		

Spiritual Life

Answer

Score

I read my Bible on a regular basis		
I pray daily and have a rich prayer life		
I focus on living a Spirit filled life		
I have a church or a place where I meet to worship with others		
Total:		

TOTAL:	
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If you have any questions, or need help getting started in the right direction, feel free to contact Vibrant Aging Solutions either to schedule a free 15-minute information call, or to set a time for a consultation.