

A Game-Changing Approach to

# AGING Successfully



A Conversation between Monica Lenches, Seniors Real Estate Specialist, and Deborah DiNapoli, Chief Operating Officer at Senior Planning Services.



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A Life Changing Approach to Aging Successfully

People often use the words 'help' and 'support' interchangeably, unaware that there are important differences that can be life changing. There are times in all of our lives when either support or help or both are needed. It is essential that we know when to ask for support and when to ask for help.

Support is the process of aligning with and committing to a person's vision and goals while allowing the individual to do their part in creating the life they desire. Support comes from a place of connection, trust, and respect for one's journey. It allows the individual to feel empowered in taking the necessary steps themselves, knowing that there is consistent, reliable support from behind the sideline. It is important to have someone who can create a safe space for externalizing one's goals, fears, worries and concerns and who can provide validation and acknowledgment as one moves through a challenging or difficult time.

Help, on the other hand, is needed when one cannot or can no longer do certain tasks on one's own. Those tasks have simply become physically or emotionally too difficult. Help involves rendering assistance and making it easier to get something done. It can show up in different ways from physically being present to accomplish a task or collaboratively working together remotely on a project towards a certain outcome.

This month's article will focus on understanding the difference between support and help and how incorporating them into one's planning process can change and/or improve your life.

ML: I have had the good fortune of getting to know you over the last few years, and one of the reasons I align with your company's mission is because of the comprehensive and holistic approach you take to serving your clients. How do you incorporate this into your line of work, and how can seniors benefit from this kind of an approach.

DD: We have found that many people are very independent, and it is sometimes a difficult decision to want to reach out for help on planning one's long term goals regarding aging. Understandably, people are proud of all they have accomplished in their lives, and it can feel too intimate or uncomfortable discussing these matters with a stranger. We invite potential clients to come into our office and meet with our Care Managers, who are health care professionals, to discuss a possible starting point. This also creates an opening for us to start getting to know each other and developing a relationship. There isn't any pressure, just an introduction to the possibilities. We always want our clients to feel that they are the "Captain of Their Own Ship", and by discussing what that would look like to them is the best way to ensure that they remain in control of their decisions for as long as possible.

ML: Can you give us examples of the support and help services you provide.

DD: We provide support through our Care Management services where Care Managers (CM) act as advocates for our clients. They work closely with clients to put a long term plan in place and make sure that our clients have a team of trusted advisors they feel comfortable and empowered working with: an estate planning attorney, physician, financial planner; a Power of Attorney for healthcare and financial decisions and possibly a Fiduciary. We consider CM the quarterback. The Care Manager is also the one who knows what our clients' wishes are in case of a health care crisis and ensures that clients receives the care they need according to their wishes. As far as "help" goes, we have experienced, compassionate caregivers who can help clients with Activities of Daily Living (ADLs: bathing, getting dressed, cooking, managing medications, etc.) Our services are available for a short term transition, i.e. recovering from a surgery or illness, or for long term care. Our mission is to help our clients maintain dignity and independence for as long as possible.

ML: At what age should people start planning for this next chapter of their lives?

DD: We always recommend that people start thinking about how they would like to see the end of their lives play out in their early to mid '60s...even though there may be many more chapters to enjoy! This way they can start forming these trusted relation-

ships with the professionals who will be on their team as they age, working together to make important decisions in a timely manner. It is critical that their team knows what is important to them in the event of a health crisis.

ML: On more than a few occasions, a health crisis and/or a mental capacity concern has surfaced during the real estate process for our senior clients which made navigating the sales transaction and the move infinitely more difficult for them. What would you recommend is the first step in creating a support system that will ensure our clients reach their vision and goals for their retirement years?

DD: Again, I recommend that people start the conversation early. The desire to age in place or make a change can become increasingly more difficult over time, and having a vision and plan can make a big difference. Whether someone is considering meeting with a Care Manager, an attorney or a financial advisor first, what is most important is to take the first step towards creating a plan. We have been serving the community with Care Management services and advice for 30 years, and we have a well developed network of senior care professionals we refer to, so we can be a good place to start.

Debra DiNapoli is the Chief Executive Officer at Senior Planning Services. They are located at 402 East Carrillo, Suite C Santa Barbara, Ca. 93101, and she can be reached at 805-966-3312 or [ddinapoli@seniorplanningservices.com](mailto:ddinapoli@seniorplanningservices.com)

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