

SENIOR WELLNESS & CARE PLANNING

& Resource List

A Practical Resource Guide for Older Adults, Families & Caregivers

South Bay Community Church • Active Seniors Adult Ministry (ASAM)

PLAN TODAY • STAY WELL • STAY CONNECTED

Aging well is more than managing health. It means preparing for the practical, financial, legal, emotional and family decisions that may arise as we age.

Your Personal Aging & Wellness Checklist

- Know your doctors, medications, allergies, insurance and emergency contacts.
- Schedule preventive care and discuss an annual wellness visit with your healthcare provider.
- Talk with family about your wishes, who you trust, and what help you may need.
- Create or update an advance health care directive and identify a trusted decision-maker.
- Review financial accounts, beneficiaries, bills and important documents.
- Make the home safer: lighting, fall prevention, emergency numbers and needed equipment.
- Build a support circle—family, friends, church, neighbors and professionals.
- Keep learning about scams, caregiving, Medicare, long-term care and community resources.

If You Are a Caregiver...

- You do not have to do everything yourself.
- Ask for help before you reach a crisis.
- Share responsibilities among family and trusted helpers.
- Protect your own sleep, health, relationships and time for renewal.
- Keep a written care plan and update it as needs change.

A Simple Family Conversation Starter

“I want us to be prepared—not because something is wrong, but because I love you. Let's talk about what matters to us, who we trust, and what we would want if we ever needed help.”

Be Proactive - Not Reactive

Planning is an act of Love.

LOCAL RESOURCES

Fremont • Alameda County • Bay Area

Alameda County Area Agency on Aging (AAA)

The County's aging network connects older adults and caregivers with services such as caregiver support, food and nutrition, legal assistance, case management, senior information, adult day care and long-term-care ombudsman services.

Senior Information & Assistance: 1-800-510-2020 or 510-577-3530

Alameda County ADRC / AAA: 510-577-3530

Online: alamedacountyca.gov • alameda.my-adrc.org

Aging & Disability Resource Connection (ADRC)

A “No Wrong Door” starting point for older adults, people with disabilities and family caregivers. ADRC can provide information and referrals, options counseling, short-term service coordination and transition assistance after hospitalization or institutional care.

Alameda County ADRC: 510-577-3530

Resource website: alameda.my-adrc.org

Caregiving & Case Management

Alameda County resources can help coordinate services that may include:

- Transportation and medical appointments
- Meals, shopping and in-home support
- Care coordination and referrals
- Medi-Cal/SSI application assistance
- Elder-abuse prevention and intervention

Fremont Care Coordination: 510-574-2041

Institute on Aging Case Management: 415-750-4111

Legal Assistance for Seniors

Legal assistance may be available for elder abuse, housing, public benefits, Social Security/SSI, Medicare/Medi-Cal, conservatorship and other matters.

Legal Assistance for Seniors: 510-832-3040

Long-Term Care Ombudsman

For concerns about care or rights in nursing homes and other long-term-care facilities, contact the Long-Term Care Ombudsman program through Alameda County aging services.

Tip: Start with the County AAA/ADRC when you are unsure which program fits your situation.

Santa Clara County

Santa Clara County Department of Aging & Adult Services (DAAS)

Provides services designed to help seniors, dependent adults, and people with disabilities remain safe and independent.

Services include:

- Adult Protective Services
- In-Home Supportive Services (IHSS)
- Senior Nutrition Program
- Meals on Wheels
- Public Guardian/Conservator services
- Supportive services and referrals

Main DAAS: 408-755-7600

Adult Protective Services: 408-975-4900

24-Hour APS Reporting: 800-414-2002

IHSS: 408-792-1600

Senior Nutrition: 408-975-4860

Meals on Wheels: 408-350-3246

Sourcewise — Santa Clara County Area Agency on Aging

A key starting point for seniors and caregivers.

Sourcewise is the designated **Area Agency on Aging for Santa Clara County** and provides information, referrals and direct support for older adults, people with disabilities and caregivers.

Services include:

- Community resource referrals
- Family caregiver support
- Care management
- Medicare counseling through HICAP
- Meals on Wheels
- Senior employment services
- Public Authority services
- Transportation resources

Community Resource Specialists:

408-350-3200, Option 1

Hours: Monday–Friday, 8 AM–5 PM

211 Santa Clara County

A useful **first-stop resource** for finding local health and human services, including senior and caregiver assistance.

Dial: 2-1-1

Ask for help locating:

- Senior programs
- Food and meal assistance
- Housing
- Transportation
- Caregiving support
- Health and social services

STATE & FEDERAL RESOURCES

Trusted starting points for information, benefits & planning

California Department of Aging (CDA)

California's aging network provides information about caregiver support, Aging & Disability Resource Connections, health insurance counseling, legal services, nutrition, fall prevention and other programs.

Website: aging.ca.gov

Caregiver resources: aging.ca.gov/Caregiver_Resources/

HICAP Medicare counseling: 1-800-434-0222

Family Caregiver Support

California's Family Caregiver Support Program is funded through the federal Older Americans Act and delivered locally through Area Agencies on Aging and partner organizations. Services can include access assistance, legal resources and respite support.

Start here: California Department of Aging caregiver resources

Eldercare Locator

A nationwide service that helps older adults, families and caregivers find local aging services and community resources.

Call: 1-800-677-1116

Website: eldercare.acl.gov

Medicare

Use [Medicare.gov](https://www.medicare.gov) to review coverage, preventive services, costs and enrollment information. Medicare Part B covers voluntary advance-care-planning discussions in qualifying circumstances, including during a Welcome to Medicare or yearly Wellness visit.

Website: [medicare.gov](https://www.medicare.gov)

Social Security

- Retirement, disability and survivor benefits
- Medicare enrollment information
- Online benefit and earnings information

Website: [ssa.gov](https://www.ssa.gov)

Veterans & Families

Veterans may have access to VA health care, home-based services, caregiver support and other benefits. Eligibility varies, so contact the VA directly.

Website: [va.gov](https://www.va.gov)

Important Reminder

Government programs and eligibility rules can change. Verify current requirements directly with the official agency before making financial or care decisions.

Recommended Reading: Caregiving & Planning

These books offer practical guidance, encouragement, and insight for caregivers, older adults, and families navigating caregiving, aging, and important conversations about the future.

1. *Take My Hand: The Caregiver's Journey* — Tia Amdurer
2. *Take My Hand Again* — Nancy Parker Brummett
3. *The Other Talk: A Guide to Talking with Your Adult Children About the Rest of Your Life* — Tim Prosch, AARP
4. *The AARP Caregiver Answer Book* — Barry J. Jacobs, PsyD and Julia L. Mayer, PsyD
5. *Today's Caregiver* – Online Information, Support & Resources for Caregivers. Website: Caregiver.com

All books are available on AMAZON

PLAN • ORGANIZE • PROTECT

Keep this page and review it with your family or trusted support person

Important Documents to Locate

- Advance Health Care Directive / health care proxy
- Financial power of attorney
- Will, trust and beneficiary designations
- Insurance policies and Medicare information
- Bank, investment and retirement account information
- Mortgage/lease and property information
- Emergency contacts and physician information
- Medication list, allergies and important medical history

My Care & Support Circle

Person / Organization	Role	Phone / Contact

My Next 5 Steps

1. _____
2. _____
3. _____
4. _____
5. _____

Questions to Discuss With Family

- Who should speak for me if I cannot make my own medical decisions?
- Where would I prefer to live if I can no longer live safely at home?
- What kind of help would I accept—and from whom?
- How will we communicate about finances and major care decisions?
- What are my wishes for serious illness, hospitalization and end-of-life care?
- Who should be contacted in an emergency?

A Final Word

**Good planning gives families more choices and can reduce stress during a crisis.
You do not need to complete everything at once. Start one conversation, gather
one document, make one call, and take the next step.**