IN HOME AGING SOLUTIONS, PLLC

CLIENT PERSONAL PROFILE & PREFERENCES

Getting to know you helps us provide thoughtful, respectful, person-centered visits. You or a family member may complete this form. All questions are optional.

1 | BASIC INFORMATION

Preferred name / nickname: Date completed:

Completed by (name / relationship):

How would you like us to address you? ☐ First name ☐ Mr./Ms. + last name ☐ Other:

Important people in your life (and preferred names for them):

2 | PERSONAL STORY & INTERESTS

Where did you grow up? What places or memories are meaningful to you?

Past or current work, hobbies, interests, or accomplishments you enjoy discussing:

Favorite music, TV shows, movies, books, games, sports, or activities:

Favorite foods, drinks, snacks, and treats (include any preferences):

Pets, faith/spiritual practices, traditions, or celebrations important to you (optional):

3 | CONVERSATION & CONNECTION

Topics or stories you enjoy talking about / good conversation starters:

Topics, questions, names, or memories you would prefer us to avoid:

What makes you laugh, smile, or feel at ease?

How do you prefer to socialize? ☐ Talkative ☐ Quiet company ☐ Small groups ☐ Varies

4 | DAILY ROUTINES & COMFORT

Typical daily routine / preferred times for visits:

Favorite activities to do together during a visit:

Things you dislike, find frustrating, or prefer done a certain way:

Preferences for lighting, noise, TV/radio, room temperature, and personal space:

What helps when you feel worried, overwhelmed, tired, or upset?

5 | COMMUNICATION & RESPECT

Best way to communicate with you (pace, hearing, vision, written reminders, etc.):

How would you like us to offer help while supporting your independence?

Any cultural, personal, or privacy preferences you would like us to respect?

6 | FAMILY / CARE PARTNER INSIGHTS (OPTIONAL)

What should a new visitor know to help make a good first impression?

Any approaches that work especially well—or that we should avoid?

_____

Anything else you want us to know about this person as an individual?

_____

Thank you for sharing. We will use these preferences to help guide visits and update them as needed. Please avoid including passwords or other highly sensitive information.