

PLANNING FOR AGING PARENTS

Helping Navigate the Financial & Caregiving Journey

The conversations to have before a crisis forces them.



1



UNDERSTAND THEIR FINANCIAL PICTURE

Create a complete list of all income sources, accounts, insurance policies, debts, and expenses. Knowing where everything is avoids surprises later.

2



UNDERSTAND THE CARE PLAN

What aging in place would look like? Explore care options and the costs of in-home care, nursing care, or assisted living.

3



GET THE LEGAL PIECES IN PLACE

Keep legal documents up to date—wills, trusts, powers of attorney, and healthcare proxy—and set up oversight tools like bill pay automation and fraud monitoring.

4



KNOW YOUR ROLE

Hold a family meeting. Get everyone on the same page about values, plans, responsibilities, and expectations.

5



PROTECT YOUR OWN FINANCIAL PLAN

Include your parents' needs in your financial plan—balancing care for them, your own retirement, and your children's future.

HOW WE CAN HELP



- ✓ Coordinate with your family's attorney, CPA, and insurance professionals.
- ✓ Help you evaluate care options and their financial impact.
- ✓ Build a plan that protects your parents—and your own financial future.
- ✓ Provide ongoing guidance as needs and circumstances change.

BE A TEAM YOU CAN TRUST



We introduce you to a team of professionals—estate attorneys, elder care experts, and tax advisors—so you and your family have trusted support when it matters most.

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*Good planning today can bring peace of mind
for your family tomorrow.*

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