

Conference on Aging

Important Planning Questions to Consider
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1. Do you have any experience with someone who has needed to be cared for?
2. If you needed care at home or a facility, which asset would you sell first?
 - Better way to use funds
 - Leverage your money
 - Tax advantages
3. If we get older without a plan for our care, it will often fall on our kids or spouse. What role will they play in your caregiving?
 - The impact of them providing for care (even paying for it)
4. Have you given any thought to you spouse potentially needing to be cared for and how it will affect you physically and/or your finances?
 - Can I do it? Can I get them into bed, shower, restroom?
 - Will I be able to sustain my life as I know it?
5. Do you have portfolio insurance?
6. If you knew you were going to be diagnosed with Alzheimer’s tomorrow, how much insurance protection would you buy today?
7. Did you know that Medicare doesn’t pay for long-term caregiving?
8. What do you think your health will be like in the first 10 years of your retirement?
9. What do you think it will look like in the last 10 years?
 - How does aging without a plan play out?
10. Have you considered if you live past 80, 85, 90?
 - Can we outlive our money?

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