

Laurie Menzies - Longevity Plan

	Because	So That	Here's How	Here's What to Do
Financial	<p>You've saved money for a reason</p> <p>Decide: spend or pass along?</p> <p>Living life in retirement costs money, and so could potential long-term care</p>	<p>Your financial situation has clarity</p> <p>AND your money is spent by death</p> <p>OR your money is retained for heirs</p> <p>AND your money is spent on what you value</p>	<p>Q&A: What is your intent with your money?</p> <p>Q&A: How will money be allocated—spend or preserve for heirs?</p> <p>Q&A: What is your relationship to money? Are you worried?</p>	<p>Financial Inventory</p> <p>Determine financial plan</p> <p>Consolidate accounts</p> <p>Make adjustments with advisors</p>
Health	<p>We live longer than ever</p> <p>Growing older can be difficult</p> <p>Trusted family members should know your plans</p>	<p>You control how you live and die</p> <p>You have a plan for your care</p> <p>Your happiness is maximized</p> <p>Your lifestyle is planned</p>	<p>Inventory of current health</p> <p>Inventory of family history/illness</p> <p>Lifestyle changes</p> <p>Identifying trusted family and friends</p>	<p>Establish relationships with specialists</p> <p>Determine healthcare proxy</p> <p>Focus on wellness</p> <p>Make plans for future needs</p>
Social	<p>Relationships are crucial to good aging</p> <p>Everyone needs a support network</p> <p>Aging requires help from others</p> <p>Where do you want to retire?</p>	<p>Your life continues to matter</p> <p>Surrounded by love and happiness</p> <p>Others can help you monitor your care</p> <p>Avoid family stress</p>	<p>Q&A: Which relationships are important?</p> <p>Inventory of who and what you value?</p> <p>Plan life based on proximity to values</p>	<p>Plan hobbies and activities</p> <p>Arrange proximity to loved ones</p> <p>Build community and new friendships</p>
Legal	<p>You have possessions and plans</p> <p>We can plan to take care of things</p> <p>Law can protect your intentions</p>	<p>The results of your life are valued</p> <p>Your assets are managed correctly</p> <p>You have someone you can trust who can legally help you</p>	<p>Options to protect assets</p> <p>Determine heirs</p> <p>Techniques to avoid probate</p>	<p>Draft will / estate plan / trust</p> <p>Appoint legal proxy / Power of Attorney</p> <p>Communicate with lawyers</p>