WealthCare: Financial Planning for Elder Care Needs

Plan now for a secure future

In-depth financial analysis allows a hypothetical financial pinpoint of cash flow and portfolio conditions under a variety of life circumstances

Make informed decisions now that translate to better options later

- Illustrate the effect of Long Term Care scenarios on cash flow and portfolios
- Plan for survivor needs and income changes
- Create strategies to spend existing assets according to eldercare financing plan
- Examine cash reserves and determine liquidity needs
- Analyze existing insurance to ensure appropriate for current needs
- Test risk sensitivity of portfolio investment allocation for continued suitability
- Plan for tax sensitive distribution from retirement accounts
- Carve out assets for legacy planning from cash flow

SEIA
SIGNATURE ESTATE & INVESTMENT ADVISORS, LLC®
www.SEIA.com

Thomas West, CLU, ChFC, AIF® | 703.287.7142 | TWest@SEIA.com

8607 Westwood Center Drive, 3rd Floor, Vienna, VA 22182