

WealthCare: Financial Planning for Elder Care Needs

Plan now for a
secure future

In-depth financial
analysis allows a
hypothetical
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

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