

Plan for the expected. Prepare for the unexpected.



Making a difference in the lives of our clients and each other



Be proactive to stay in control



Legacy and
estate strategy



Beneficiary
designees



Insurance and
care options

Be proactive to stay in control (cont.)



Working with your financial advisor and your team of tax and legal professionals to create a legacy and estate strategy is important. A durable power of attorney, health care directive and living will can help you outline your wishes and help ensure those wishes are carried out.

Have you:

- Met with an attorney concerning your will?
- Assigned a Power of Attorney for medical and financial?
- Set up a medical directive?

The importance of beneficiaries



- Who are my current primary and contingent beneficiaries?
- Do my current beneficiary designations reflect my wishes?
- Do I have accounts without beneficiaries that need updating?
- Do I want to consider a family meeting to discuss legacy desires?

Watch out for scams and fraud

- \$2.9B in fraud and financial abuse schemes annually
- Romance, grandparent and sweepstakes scams are very common
- Talk to your FA about the role a trusted contact can play



Steps you can take today



- Designate or update beneficiaries
- Talk about legacy and estate planning; protect goals with life insurance and long-term care strategies
- Educate yourself on red flags of fraud; tell others what you've learned

Moments that matter



The impact of Alzheimer's and dementia in our community



Alzheimer's Association®

24/7 helpline
1-844-440-6600

Any questions?

