My Financial Plans

Financial: Dashboard Decisions

My Financial Dashboard Decision: (Select one)

- ☐ I am confident with my current Financial Plan
- ☐ I would like to create/review my Financial Plan

My Financial Dashboard will provide the following information: (Select all that apply)

- ☐ When is the ideal time to retire?
- ☐ When should I start Social Security benefits?
- ☐ How can I best maximize Social Security benefits?
- ☐ Should I invest in a long-term care insurance policy or not? If so, should it be a traditional policy, an asset-based policy, or a hybrid?
- ☐ Should I convert my traditional IRA accounts to Roth IRA accounts?
- ☐ How should I invest my assets?
- ☐ Other: (Note below)

My Financial Planner Decisions: (Select one)

- ☐ I have a Financial Planner that I like
- ☐ I would like to speak with a new Financial Planner
- ☐ I'm undecided

Notes regarding my Dashboard and Financial Planner:

Financial: Address Long-Term Care Costs

Answer this section after reviewing a thorough Financial Dashboard with your Financial Planner.

Long-Term Care: Private Pay Solutions

- [ ] I plan to utilize Private Pay for Long-Term Care
  - [ ] I will draw from my savings
  - [ ] I will use a reverse mortgage
  - [ ] I'm ready to speak with a Reverse Mortgage Specialist

Long-Term Care: Insurance Solutions

- [ ] I plan to use Long-Term Care Insurance
  - [ ] I will use a Traditional Plan
  - [ ] I will use an Asset-Based Plan
  - [ ] I'm ready to speak with a Long-Term Care Insurance Agent

Long-Term Care: Public Assistance Solutions

- [ ] I plan to use Public Assistance
  - [ ] I will apply for Medicaid
  - [ ] I will apply for VA
  - [ ] I'm ready to speak with an Elder Law Attorney for help qualifying for benefits

Notes regarding my plan to cover Long-Term Care Costs:

Financial: Minimize Burden on Others

I plan to minimize burdens on others by doing the following: (Select all that apply)

- ☐ Acquire a Financial Planner – and name them in my Agent Instructions with my Powers of Attorney.
- ☐ Acquire an Accountant for Taxes – and name them in my Agent Instructions with my Powers of Attorney.
- ☐ Set up Bill Pay – and detail my system for my Agents.
- ☐ Set up Password management – and make the list easily accessible to my Agents.
- ☐ Prepay Final Expenses – and make the forms easily accessible to my Agents.
- ☐ Acquire a Property Manager or Handyman – and name them in my Agent Instructions with my Powers of Attorney.
- ☐ Arrange for a Geriatric Care Manager – and name them in my Agent Instructions with my Powers of Attorney.

Notes regarding my plan to minimize my burden on others:

Notes