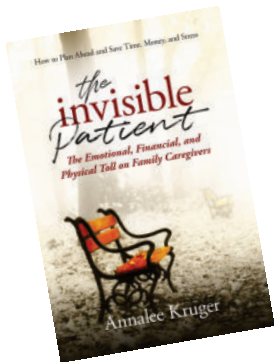




CARE RIGHT Inc.
YOUR CONCIERGE OF SENIOR CARE PLANNING

Financial Advisors & Aging



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Why Advisors Should Be Concerned

- Number of Americans age 65+ has nearly tripled in last 50 years and life expectancy is on the rise
- Retirement can exceed 25 years
- Clients are vulnerable to diminished capacity
- Clients at risk of caregiver burnout and costs of care
- Dementia is known as the most expensive diagnosis

How Caregiving Impacts AUM

Elder spousal caregivers usually lead to caregiver burnout and a higher mortality rate.

If the caregiver...

- is funding the care recipient, they are not funding their retirement account to its fullest potential
- quits their job/declines job promotion/takes early retirement
- adult kids spending thousands out of pocket in "rescue missions" each year

**Ask About Our Elder Planning
Specialist Certification Program**

(239) 676-3170 ext. 700

www.SpeakWithAnnalee.com • WeCare@CareRightInc.com

www.CareRightInc.com

Questions to Ask Your Clients

- Are you a family caregiver?
- Is there anything impacting your personal wellbeing/finances/health?
- What conversations have you had with your family about aging and potential care needs?
- Have you had any medical crisis/hospital situations since we last spoke?

We Are Your Concierge for Senior Care Planning Common Vulnerabilities Associated With Your Clients' Portfolios

- Not addressing aging, family caregiving, dementia, care and end-of-life
- Not using a collaborative approach—experts in the areas your clients need
- Seniors are at risk of financial scams
- Not allocating the actual costs of senior care in the financial plan
- Using outdated care costs

The Value Proposition of Leveraging Care Right Inc's Services With Your Clients

- Improves relationships; makes your relationship more "sticky"
- Opportunity to obtain portfolios from whole family/not lose the portfolio when the aging parents pass away
- Referring shows you care about the "human side" of their financial plan
- Opportunity cost of not having an Aging Plan/using a collaborative approach
- Email introductions are the most effective



Schedule a
FREE
30-minute
consultation!



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