



Financial Planning

For Your Retirement

When it comes to your finances, AgingOptions' goal is not to give you investment advice. It is to help you protect your assets so that as you age, you do not end up broke and struggling. To be clear, having a lot of money doesn't guarantee you'll avoid institutional care. How you plan, manage, protect, and entrust your money to the right people is far more important than the amount of money you have.

It is not only important to have your financial decisions in order, but it is also critical that you provide the right guidance to your named agents clearly documented, so they know what outcomes to shoot for and what resources to utilize to help you realize your goals, when you can no longer manage your own affairs.

Your fiduciaries will be expected to carry out your wishes and manage your assets when you are no longer able to make your own decisions. The financial decisions you make now will go a long way toward securing not only your assets but also your peace of mind and quality of life as you age. So, too, will this knowledge minimize the burdens others will have to bear.

Your finances will not just magically manage themselves when a crisis arises, and things will not simply fall into the right places when the time comes. You need to build your own financial plan to ensure that your assets are utilized the way you want them to be.

