

EVERCORE

Wealth Management

Trust Company

THE NEW STANDARD IN WEALTH MANAGEMENT



We've Got This: Successful Aging Takes a Team

LONGEVITY: WE ALL SEEK IT, BUT DO NOT PLAN FOR IT

70%

of those over 65
will need some form of
long-term care

20%

of those over 65 have
fallen prey to some kind
of financial abuse

70%

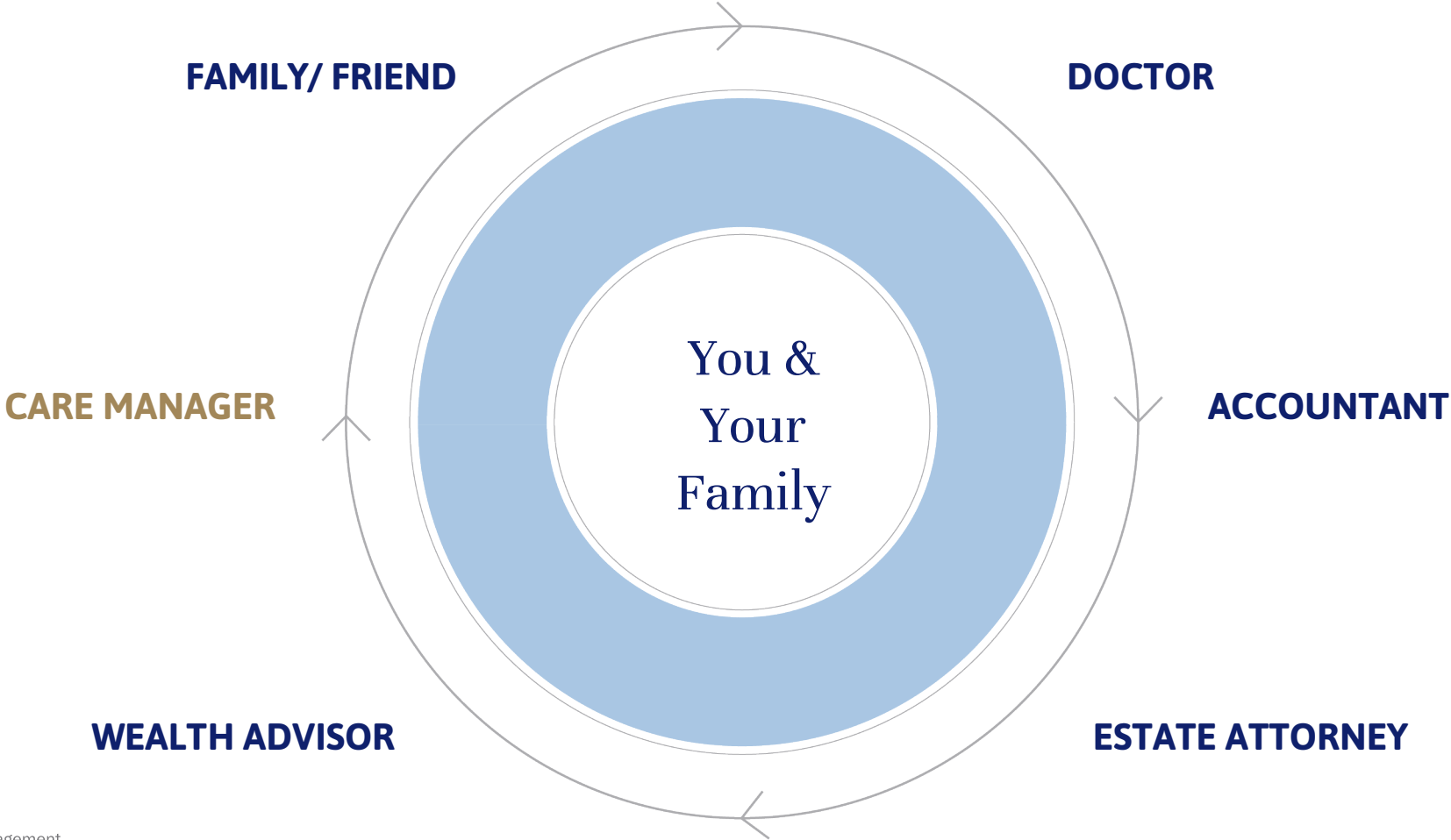
of those over 80
experience some form of
cognitive decline

TOGETHER WE WILL HELP YOU BE IN THE POSITION TO ANSWER THESE QUESTIONS FOR YOURSELVES OR YOUR PARENTS

- **Who should be on my aging team?**
- **What documents do I need to have in place?**
- **Who should I call first in the event of an incident?**
- **What is the role of my wealth advisor?**
- **What is care management?**
- **What housing and care options should I consider?**
- **How much does care cost and how can I plan for it?**
- **What is financial elder abuse and how can I prevent it?**
- **How can I engage the family and prevent disputes?**

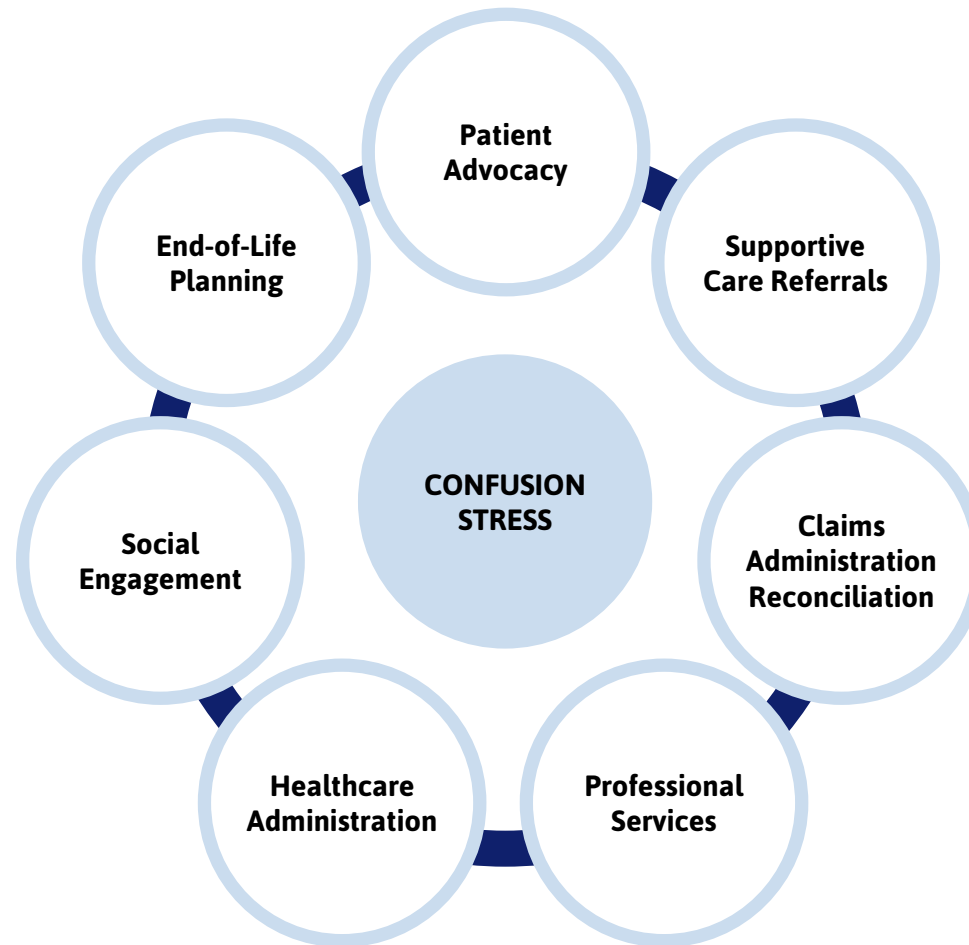
YOUR TEAM AS YOU AGE

Each member of your team works together to protect you and your family and help fulfill your goals



WHAT DOES A “CARE MANAGER” LIKE THEIA DO?

A Family Experiences a Fragmented Landscape



Few unbiased providers with the needs of the family at the forefront

COMMON SCENARIOS FAMILIES FACE

Common scenarios with significant nuances based on individual needs and family dynamics

THE RECENT WIDOW

PARENTS WITH DIFFERENT CARE NEEDS

DEVELOPING A PLAN

MEDICARE ELIGIBILITY

HEALTHY SPOUSE

FAMILY DYNAMICS

IS IT FORGETFULNESS OR DEMENTIA?

ACHIEVING LONGEVITY

KEY DOCUMENTS AND INFORMATION

Maintain complete records of your key documents and information. Review and update as needed and share it with your team.

KEY CONTACTS

PERSONAL INFORMATION & MEDICAL RECORDS

USERNAME AND PASSWORDS FOR DIGITAL ASSETS AND ONLINE ACCOUNTS

FINANCIAL INFORMATION

ESTATE PLANNING DOCUMENTS

HEALTH AND HOUSING OPTIONS

There are a range of housing options, which one is right for you and your family?

AGING IN PLACE

55+ INDEPENDENT LIVING COMMUNITY

CONTINUING CARE RETIREMENT COMMUNITIES (CCRC'S)

ASSISTED LIVING FACILITY

SKILLED NURSING FACILITY

HOME HOSPITAL

CONCLUSION AND NEXT STEPS

- **Establish your team and make sure your wishes are known to the appropriate team members**
- **Update your plan and documents on a regular basis or when there are changes to your circumstances or taxes and share with appropriate team members.**
- **Best practice is to share your plans with your family – but this is a very personal decision.**
- **This is a journey – be prepared to enjoy the rest of the trip.**

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Q&A