THE COLLABORATIVE

FINANCIAL CARE MANAGEMENT:
THE NEW REALITY IN RETIREMENT AND DISTRIBUTION PLANNING

People are living longer. The years between "retirement" and leaving one's legacy are growing longer and longer, and advisors need new tools and approaches to serving their investors and their families.

Many advisors are not equipped to have these conversations or ask the right questions at the right times. There are emotional and legal issues, and family dynamics to be considered. The leaders of The Collaborative have experienced these planning considerations with our own parents and families and are committed to bringing these important topics to the advisor marketplace.

We offer the following topics for webinars, half- or full-day seminars (for advisors or client events) or as presentations for larger groups of advisors:

- Dealing with the Top Ten Mistakes Most Investors Make
- Strategic Teaming to Serve an Aging Client Population
- Diminished Capacity—Shades of Grey
- There's No Place Like Home—The Aging-in-Place Phenomenon
- The Conversation—Which One and When
- Navigating The Health Care Maze
- Care giving—The Emotional/Financial Impact to Families
- The Elder Law Guide to Growing Old
- Family Dynamics and Conflict
- The Financial Care Management Intake Process
- Dealing with Financial Exploitation "The Crime of the 21st Century"

To learn more, visit us at
the-collaborative.com/aging-program
or call us at 508-359-8216