AgeWell MIDDLE TENNESSEE

Keys to Living & Aging Well: Financial Well-Being for a Long Life

June 13th, 2023
1:00 – 2:00 pm

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Panelists

- Gary Collier
- Jacob Hodges, CFP
- Jenn Block, PhD

Gary L. Collier

Private Wealth Manager,
Raymond James Financial Services

- Planning & saving for longevity
- Finding a trusted adviser and coming up with a plan
- What goes into creating a plan?

Key Questions to Consider

- ➢ Most of us have different ideas for how we'll spend our time, and everyone's path is unique to them.

- ➢ As people approach longevity, many questions should be considered:

- How long will the money last?
- Am I protected from harm?
- Will I receive the care I need?
- How will I spend my time?
- How will I give what I've gained?

Two key considerations

Caregiving

Who is there to support you when you need it?

Who do you help care for?

We can help you understand and prepare for the emotional and economic costs of caregiving.

We can connect you with resources for care support.

Housing

Where do you intend to live your modern retirement?

Do you (or your loved one) plan to age in place?

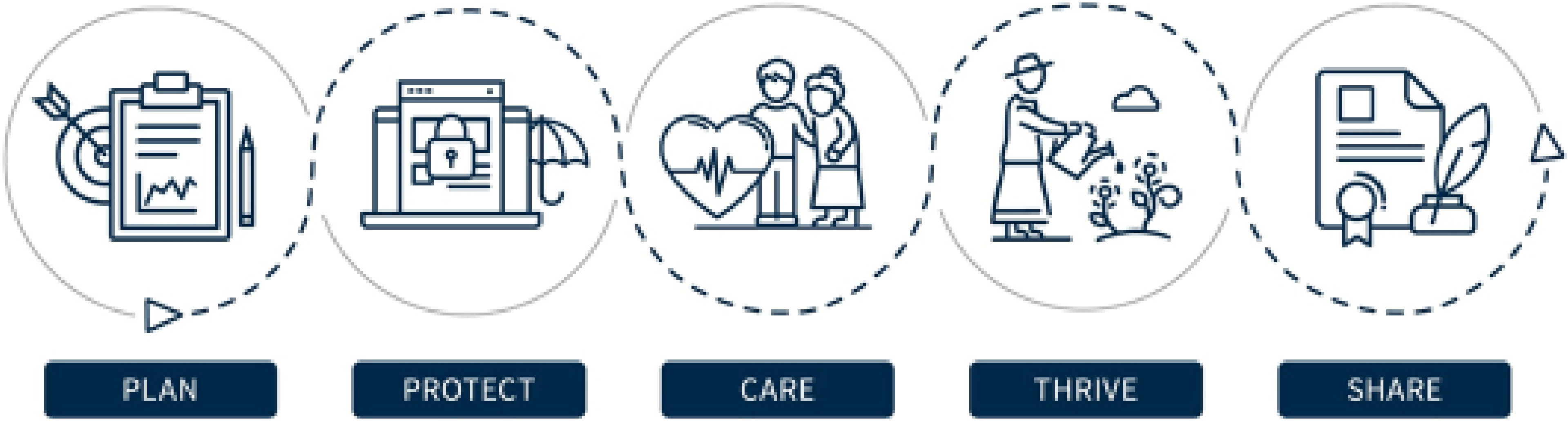
Is your home safe for aging in place?

Do your loved ones need support in their homes?

Diving Deeper

Your quality of life – carefully considered

Our approach to longevity planning helps you answer tomorrow's big questions today.



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RAYMOND JAMES

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C. Jacob Hodges, CFP
Lead Financial Advisor,
Premier Private Wealth, LLC

Inflation Trends

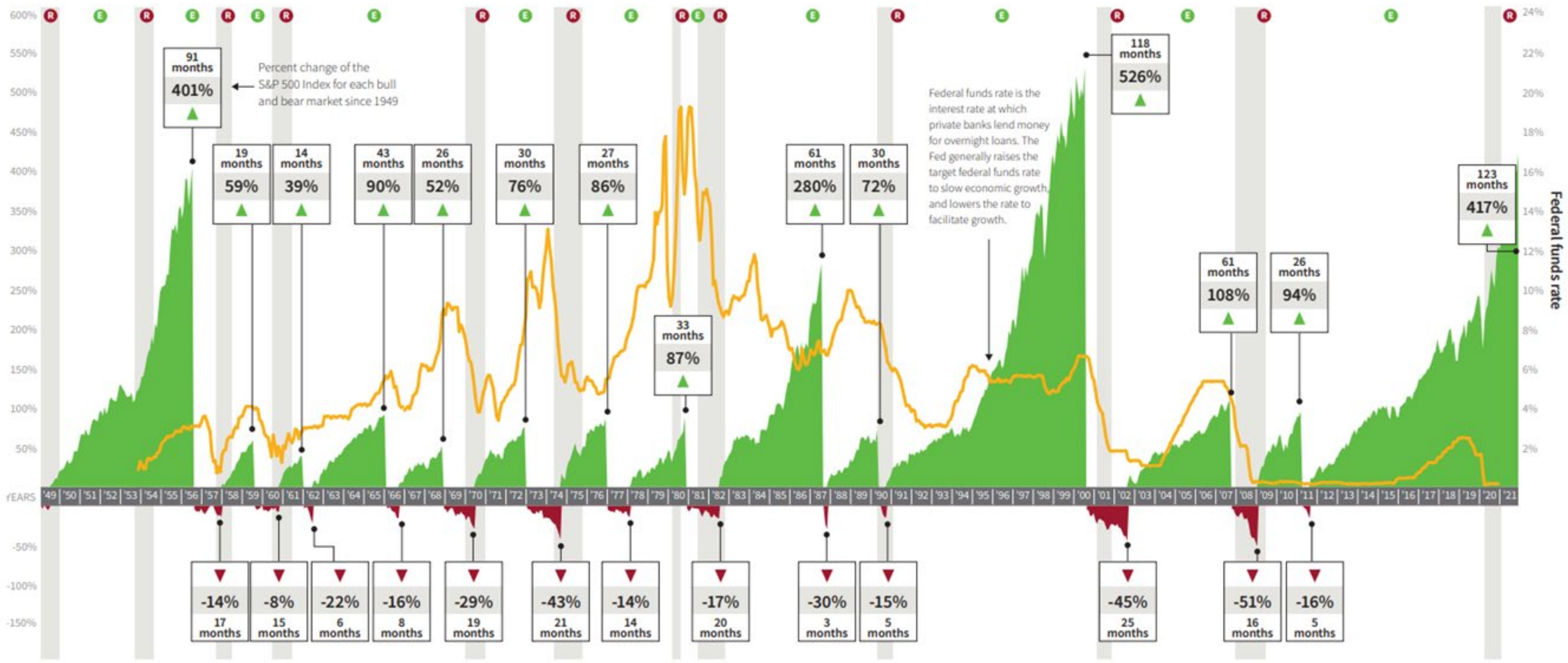
Which Direction Are We Headed?

Will We Have a Recession?

Recession Probability

Bear vs Bull Markets

Which is Stronger Over Time?



Sources: S&P 500, Putnam Investments. Data is as of 12/31/21, is historical, and reflects reinvested dividends. Past performance and market conditions do not guarantee future results and may not be duplicated. The S&P 500® Index is an unmanaged index of common stock performance. It is not possible to invest directly in an index. Federal funds rate data was not available before July 1954. A bull market is here defined as a period when the stock market rises for at least four straight months. A bear market is defined as a market decline of at least four months.

What Estate Planning Documents/ Tasks are Essential?

Legacy Planning

- Will
- Power of Attorney
  - Durable vs General
  - Medical vs Financial
- Beneficiary Review
- Insurance Coverage
- Trust Planning

Best Practices

Avoiding Scams/Exploitation

- Scam of the Month Newsletter
- Email Phishing
- Fake Texts
- Faulty Venmo Requests
- Two Factor Authentication
- Trusted third party

Jenn Block, Ph.D.
Block Consulting &
AgeWell Board of Directors

Helpful Resources

Community Resources

- United Way Financial Empowerment Center (for Nashville residents)
- AgeWell *Directory of Services* & Helpline - covers 13 Middle TN counties
- AgeWell *Scam of the Month* emails https://agewelltn.org/scam-prevention
- National Council on Aging (NCOA) - AgeWell Planner and BenefitsCheckUp® online tools

Q&A

Questions for the Panel

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Contact & Resources

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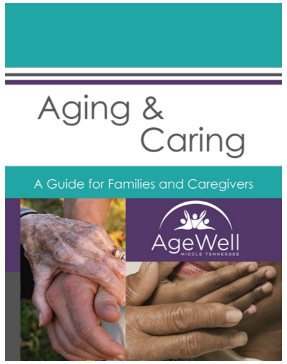

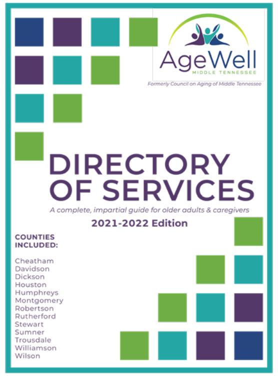

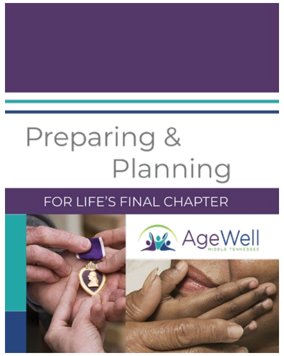

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