

When planning for their future, individuals, couples, and families engage us when they want clarity, peace of mind, and to save valuable time and money.

PROACTIVE PLANNING

Common Considerations

- Am I able to stay at home?
- Should I be considering downsizing or a retirement community?
- What costs do I need to be prepared for?
- How do I ensure I'm not a burden to my adult children?
- Who will help me as I age if I don't have family or a partner to rely on?
- What else should I be thinking about?

These are significant decisions with high costs, so it is prudent to hire an expert to make the most informed decisions.

We guide clients through the myriad of options and provide due diligence when considering big decisions.

By engaging Aging Wisdom, you benefit from our collective expertise. We'll help you understand your options, strategize your unique situation, and guide you in your decision-making.

OUR PROCESS

Step 1: Proactive Planning session to strategize around your top concerns and goals.

Step 2: Thoughtfully curated recommendations and individualized resources that become your planning road map.

Step 3: Expert guidance and support as additional questions and decisions arise.

Visit our website -- agingwisdom.com -- and click on **SCHEDULE A CALL to learn more about Proactive Planning.**

We look forward to partnering with you!



Aging Wisdom inspires hope through creative solutions so our clients live well, care well, and age well.