



Explore Our Longevity Planning Resources

PLAN

PROTECT

CARE

THRIVE

SHARE

Congratulations on taking the next step in planning for your future! We offer our clients a variety of longevity planning resources – which ones could benefit you and your family the most? Once you've completed this questionnaire, please send to Toni@MillstoneEvansGroup.com and your responses will help drive our next discussion. Or if it's easier for you, we can simply explore options together. Thank you!

PLAN – Achieve new levels of medical coverage assurance and financial confidence through holistic planning

Are you within six months of Medicare enrollment age (65)?

_____ **Yes** _____ **No**

Would you like help reviewing your Medicare options so you have the one that best suits your needs? This could be either for enrolling the first time or evaluating a current plan.

_____ **Yes** _____ **No**

Would you like access to do-it-yourself (DIY) document creation for estate planning?

_____ **Yes** _____ **No**

Do you have an outstanding legal matter that you could benefit from access to a network of attorneys at a discounted rate?

_____ **Yes** _____ **No**

PROTECT – Safeguard your savings and health

Would you like protection against financial fraud?

_____ **Yes** _____ **No**

Would you like your family or friends to help protect your accounts against financial fraud? Or would you like to help protect an elder family member or friend's accounts against financial fraud?

_____ **Yes** _____ **No**

Are you interested in life insurance, annuities, or long-term care as a part of your planning?

_____ **Yes** _____ **No**

CARE – compassionate assistance for caregiving commitments and costs

Would you (or a family member or friend) like to know if your home is safe for aging in place?

_____ **Yes** _____ **No**

Would you like help finding home healthcare services, an assisted living facility or other caregiving options for yourself or a family member?

_____ **Yes** _____ **No**

Would you like assistance coordinating care for a senior or individual with special needs?

_____ **Yes** _____ **No**

Would you like access to a healthcare concierge to help you and your family if a health crisis or difficult diagnosis occurs?

_____ **Yes** _____ **No**

THRIVE - make retirement an opportunity to redefine your connections and purpose

Are you interested in receiving a free copy of the Thrive Guide? This guide offers recommendations for cultivating your community, nourishing your body and mind, redefining your passions, and more.

_____ **Yes** _____ **No**

SHARE - organize and live the legacy you wish to share

Are you interested in creating an archive to share your life and legacy with family and friends?

_____ **Yes** _____ **No**

Would you like to have critical life details prepared for your family as a part of your legacy planning?

_____ **Yes** _____ **No**

Explore our [longevity planning resources online](#).

Contact *Lifecycle Planning Specialist* Toni Noto at 720-728-2809 or Toni@MillstoneEvansGroup.com.

Visit our website www.MillstoneEvansGroup.com for more general information,

Reach The Millstone Evans Group main office at 720-728-2801.

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