



Longevity Planning Questionnaire

By answering these questions and sending your responses to us before we meet, our team will be able to make the best use of our time together as we consider and plan for whatever services and support you need.

If any of these questions resonate with you, please complete this questionnaire and send to Toni@MillstoneEvansGroup.com. Thank you!

MEDICARE

Are you within three years of Medicare enrollment age (65)?

____ Yes ____ No

Would you like help reviewing your Medicare options? This could be either for enrolling the first time or evaluating a current plan.

____ Yes ____ No

FINANCIAL FRAUD PROTECTION

Would you like protection against financial fraud?

____ Yes ____ No

Would you like your friends or family to help protect your accounts against financial fraud?

____ Yes ____ No

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

____ Yes ____ No

YOUR LEGACY

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

____ Yes ____ No

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

____ Yes ____ No

INSURANCE

Do you currently have life insurance or other forms of insurance?

____ Yes ____ No

Are you interested in life insurance or other forms of insurance as a part of your planning?

____ Yes ____ No

THRIVING

Are you interested in hearing about guidance related to thriving throughout retirement?

____ Yes ____ No

AGING SERVICES (INCLUDING HOUSING AND HEALTHCARE)

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

____ Yes ____ No

Boulder 4999 Pearl East Circle, Suite 200 // Boulder, CO 80301

Denver 1401 17th Street, Suite 300 // Denver, CO 80202

TF 800.201.4554 F 866.522.9588 T 720.728.2801

Visit www.MillstoneEvanGroup.com for more information,

The information contained in this email communication is confidential and is intended only for the recipients named above and any others who have been specifically authorized to receive it. Any unauthorized dissemination, copying or use of the contents of this email is strictly prohibited. This communication is for informational purposes only and does not constitute a recommendation, solicitation or offer to buy or sell securities or any other financial instrument, nor is it an official confirmation of any transaction. Neither The Millstone Evans Group, LLC nor any of its officers, directors, or affiliates represents that the information presented in this email is accurate, current or complete, and such information is subject to change without notice. Any performance information must be considered in conjunction with applicable disclosures. Past performance is not necessarily indicative of future results. The contents of this email should not be construed as legal, tax, or other advice. Individuals are urged to consult with their own tax or legal advisors.