

[Clients as Caregivers: Helping Aging Parents Adapt to Change](#)

Regardless of how sharp and fit your clients' parents might be, there will likely be eventual declines in their mental and/or physical health. As their financial advisor, you can help them develop a plan that anticipates and adjusts for longevity. If you have clients in this situation, check with them to see if they would set up a meeting with their parents dedicated to discussing what their resources, wants, and needs are and their thoughts about the future.

Here are some of the things you'll want to cover in your conversation:

- Medical care costs and directives
- Income and savings
- Estate plans
- Funeral arrangements

Security Benefit offers value-add resources to help you lead your client and their parents in this vital discussion. With these tools, your client will be empowered with the knowledge to:

- Make sure their parents' estate is in order.
- Obtain a durable power of attorney.
- Visit with their parents about a living will and a revocable living trust.
- Make sure their parents designate a health care proxy.
- Understand the tax implications for beneficiaries.

[Read the Client Guide](#)

Related Value Add Marketing Resources



Helping Aging Parents Adapt to Change presentation

A seminar your advisors can give to clients with tips on addressing issues they may face as their parents age, well in advance of a crisis, to equip them to deal with issues that can impact their parents' well-being and finances.

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Helping Aging Parents Adapt to Change Summary

A handout for your clients that covers important tips on helping parents as they age – including those struggling with physical, mental, or emotional health.

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