

Letter introducing Proactive Aging Planning to your clients

Dear client,

This is the third and final questionnaire we are using to create your plan for aging. It takes about 20 minutes to complete. Please click this link when you are ready to start: <Put link here>

The “Proactive Aging Plan” identifies your desired living situation, transportation needs, and health care preferences. Using this information, we estimate your potential health care costs, including long-term care costs. Importantly, this exercise also enables us to help you put plans in place to age successfully in the living situation you desire while also reducing unnecessary health-related costs.

When you are done with this questionnaire, I will go through the report that is generated with you and we will gradually implement the tasks needed to realize your goals concerning your living situation, driving, and health care decisions. Once we have the report, you can provide it to your family to keep everyone on the same page with your goals.

Please let me know your questions and concerns. As soon as I receive notification you have completed the questionnaire, I will reach out to you.

Best regards,

Adviser

