

AGING WELL

Financial and Estate Planning

Why is financial and estate planning important?

Martha worked to save for retirement and to help her children and grandchildren financially. When Martha found out she had dementia, she wanted to prepare herself and her family for changes. With the help of her provider and Medical Legal Partnership, Martha was able to pick a decision maker for future financial decisions which gave her peace of mind. Financial and estate planning is important to help you make the best financial choices for yourself and your family.

What are some considerations for financial and estate planning?

- Health care needs that are more than you can afford or no insurance to cover all costs
- Paying your bills is becoming harder to remember
- Retired or looking to retire soon
- Wanting a will to share your wishes after you pass

Estate planning helps you to make financial plans based on your wishes. This includes making your will and health care wishes known. These plans are used when you are no longer able to make your own decisions, or after you pass.

Questions to ask yourself:

- Do your loved ones know your financial wishes?
- Have you made a will?
- Do you have a financial and/or medical power of attorney?
- Do you need long-term care insurance?
- Should you do estate planning?



For more information visit:

www.southcentralfoundation.com/aging-well

Or scan the QR code

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What can you do?

- Talk to your provider.
- Complete an advance health care directive or living will and review it every year to make sure it is up to date.
- Talk with your family about your wishes.
- Contact the Medical Legal Partnership through Alaska Legal Services for assistance to make a will.

Where can you find support?

Contact your care team at McGrath Regional Health Center (907) 524-3299

- NB
- ✓ Your Primary Care Team Your primary care team can assist you in deciding what is important and connect you to the right resources.
 - ✓ Community Resource Specialists Community resource specialists can connect you with supportive services and other resources that you may qualify for.
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- ✓ Family Health Resources (907) 729-4470
Family Health Resources can assist in exploring insurance coverage.

Key

NB Non-beneficiary

Support available to non-beneficiary

Referral needed

Travel by plane required

Travel by car required

Available over the phone or virtual visit