



Putting your Financial House in Order

Caring for a loved one takes many forms. One important way is to prepare them in case of your incapacitation or death.



What you'll learn

- **Documents:** What important documents you should make available for your next of kin to access when the time comes for them to manage your estate.
- **Accounts:** Learn what different types of accounts exist, and how beneficiaries are added.
- **Important Contacts:** We'll provide you with tips for keeping a log of your most important professional contacts, as well as your digital footprint.
- **Insurance and other benefits:** Learn how to maximize your policies and benefits for unexpected circumstances.

The purpose of the Aging Well Educational Series is to provide families and their caregivers with the important resources needed in order to better care for their loved ones. Each session will bring experts in the senior industry to speak about the services they offer. These workshops are always at no cost.

At this workshop, we will also hear from Michelle Nevins, Executive Director of Del Oro Caregiver Resource Center. Michelle will share about the the critical services that Del Oro offers to family caregivers.

Each participant will receive a booklet of important information as well as an "Heir Preparation" packet to help put everything in order.



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To RSVP to this event, please email us at
info@agingwellca.com

Franklin Templeton Building
3355 Data Drive, Rancho Cordova, 95670
Tuesday, May 6th, 2025
10:00 - 11:30 a.m.

Speakers:



SAPPHIREOAKS
WEALTH ADVISORS

