

COULD YOUR RETIREMENT HANDLE THE COST OF LONG-TERM CARE?

A quick self-assessment to help you start thinking about your options

If long-term care costs were to arise, how prepared do you feel financially?

- Very prepared
- Somewhat prepared
- Not sure how I would pay for care/I haven't thought about this yet

Which statement best reflects how you think about long-term care planning?

- I would prefer insurance or protection in place
- I like the idea of a flexible strategy (hybrid policies or annuities)
- I may be comfortable self-funding care
- I haven't explored my options yet

How much of your retirement savings could realistically go toward care if needed?

- A small portion
- A moderate portion
- A significant portion
- I'm not sure

Which of the following matters most to you when planning for long-term care?

- Protecting my retirement savings
- Preserving assets for a spouse or heirs
- Maintaining independence and choice of care
- Avoiding financial burden on family members

Have you discussed long-term care preferences with your family?

- Yes
- No
- Not in detail

If long-term care became necessary, where would you prefer to receive care?

- At home with professional assistance
- Assisted living community
- Nursing care facility if needed
- I'm not sure

When do you think long-term care planning should begin?

- As early as possible
- Within the next few years
- Closer to retirement
- I'm not sure

NEXT STEPS

Everyone's situation is different. The team at DeWitt & Dunn can help you explore which long-term care strategy may align with your retirement goals and financial plan. **Let's schedule a conversation to discuss your options.**

DEWITT & DUNN
FINANCIAL SERVICES

www.dewittanddunn.com | (972) 473-4700

Investment advisory services offered through licensed professionals of DeWitt & Dunn, a registered investment adviser.