

LifePlanning™: Elder Law Redefined



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Views on Aging

- 2 Different Views:
 - Consumer's View
 - Professional's View
- Disconnect Between the Two
- 70% Failure Rate

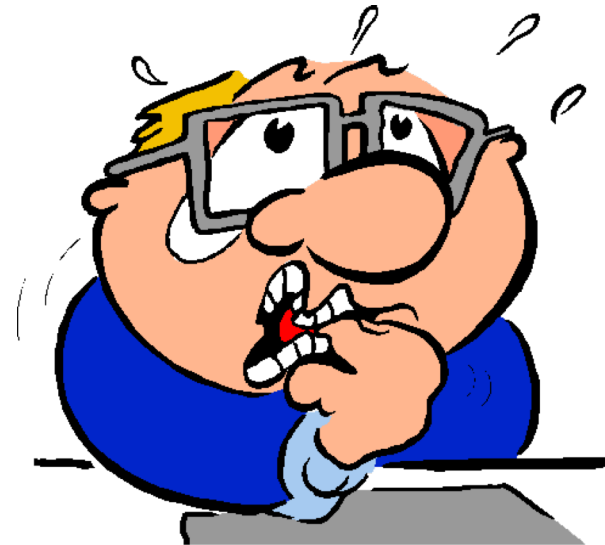
Consumer's Dreams

- Retire
- Travel
- Family & Friends
- Learn
- Volunteer
- ...



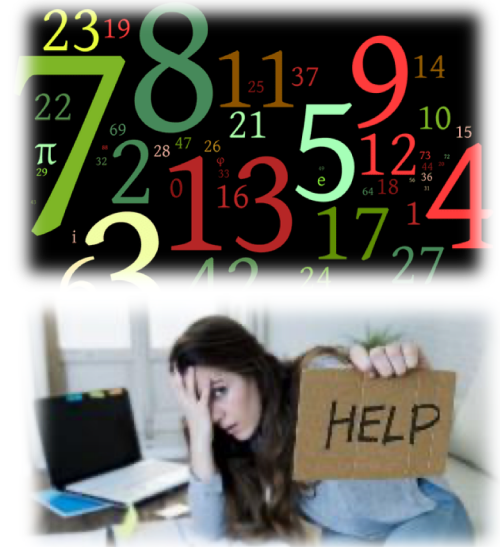
Consumer's Nightmares

- Institutional Care
- Becoming a Burden
- Lose Assets
- Family Feuds



Chance?

- 70% - Institutional Care
- 69% - Becoming a Burden
- Almost 100% - Lose Assets
- 70% - Family Feuds

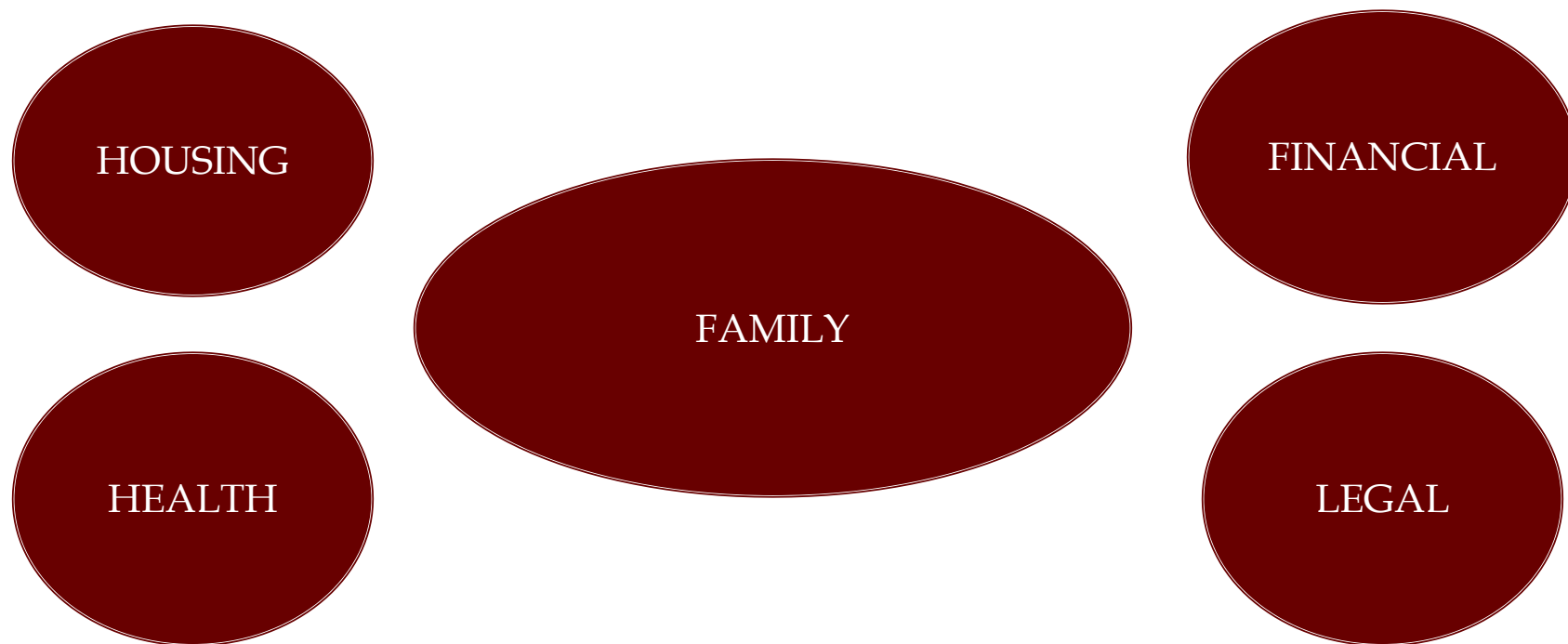


Why?

- Not because consumers do not plan . . .
... But, how they plan!



Predictable Journey



Elder Law Solutions !!!



NAELA

In conjunction with other professionals, an elder and special needs law attorney can address several issues such as:

- General estate planning
- Planning for incapacity with alternative decision-making and planning for possible long-term care needs, including nursing home care
- Locating the right care and coordinating financial resources to finance the cost of care
- Ensuring the client's right to quality care are all part of the elder law and special needs planning practice

In Other Words ...

- General estate planning issues
- Decision-making documents
- [F]or possible long-term care needs, including nursing home care
- Locating the appropriate type of care
- Resources to finance the cost of care
- Client's right to quality care

Passing Ships

- Estate Planning
- Documents
- Locating Care
- Funding Care
- Rights
- Avoid Institutional Care
- Not be a burden
- Protect Assets

The Answer?

*EDUCATION – COUNSELING
on
Better Way to Plan!*

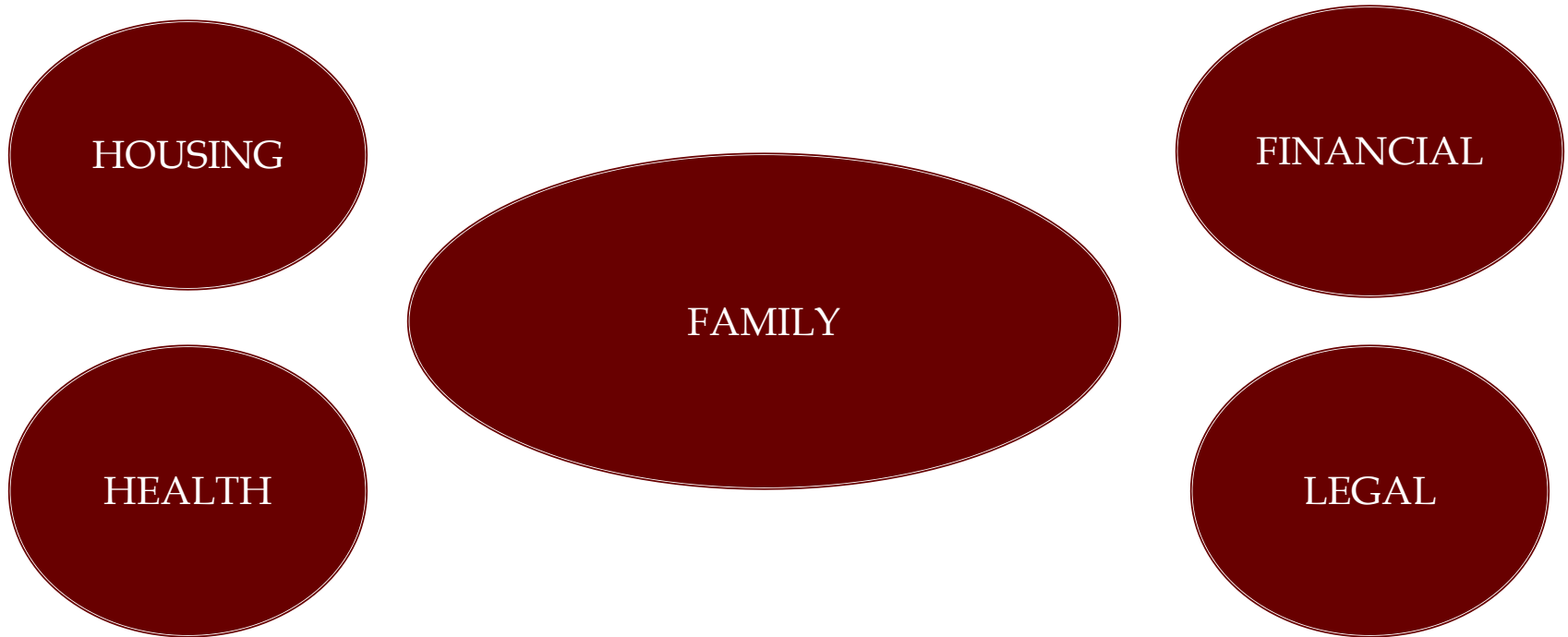
Better Way to Plan ...

LifePlanning TM!!!

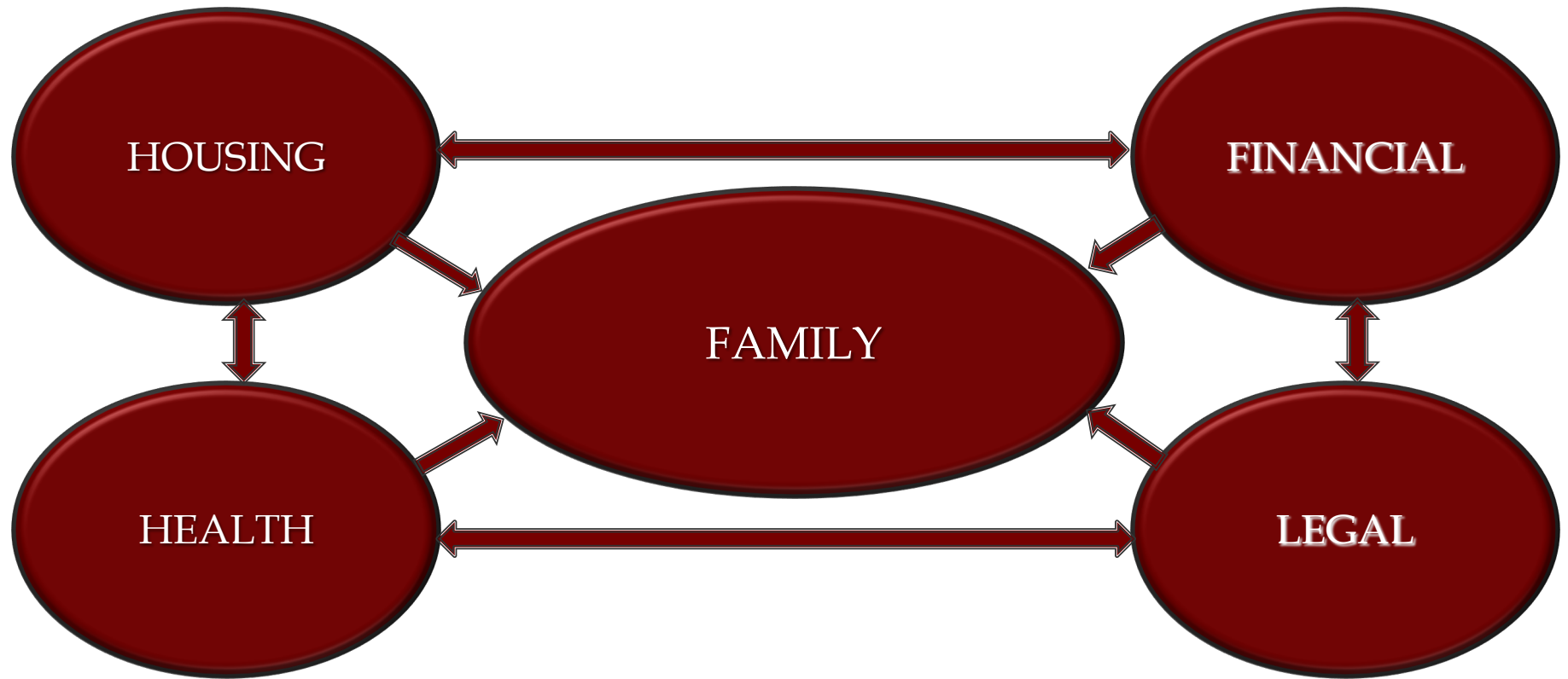
Coordinated - Comprehensive -
Multidisciplinary Planning!

Better Way to Plan...

... in key ways



LifePlanningTM



What Consumers Say About *LifePlanning!*

The Complete Package: Ken

Most ... lawyers can handle the legal problems one encounters, but usually ... not able ... to help with the physical or mental health needs ...

... woven together the legal, housing, and health concerns of aging adults into a sensible, comprehensive approach.

This approach gives the client complete control ...

Retirement Planning: William

[P]lanning was much more than legal planning ...
unlike anything that traditional attorney's offer.

[f]ocus on everything you need to plan for, medical care, housing, and financial, not just the will, medical directives, and financial POA.

Sandra

Probably the most impactful part of the step by step process ... was the family meeting we had with our adult children.

... meeting ... detailed our plan in the event of one of a multiple of life scenarios, and the "kids" were able to ask questions ... at the table.

Five years later, each one of our children still express how powerful and meaningful that meeting was.

SURVEY

How **Confident** are You That Your
Planning, Without More, Can Help
Your Clients:

- Avoid Institutional Care?
- Not Burden Others?
- Protect Assets?

LifePlanningTM

✓ 3-step Process:

1. Assess for Gaps & Holes
2. Blueprint & Implement
3. Family Meeting

✓ Better Way to Practice EL

What's Missing?

System



The Portal ...

AGINGOPTIONS

Changing the way America thinks of, plans for,
and navigates through retirement.

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LifePlan Organizer

Quick Start Estate

DIY Experience

Concierge Experience

Coming Soon

The Portal ...



The Portal

- ACADEMY

The Portal



The Portal

- Academy
- Resources
- Tool Box

The Portal

- Academy
- Resources
- Tool box
- Organizer



Professionals

- No Upfront Cost
- Zero Risk
- Competitive Advantage
- Reconnect with Old Clients
- Lifetime Income

Consumers

- \$400 – year
- Shared Revenues

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Questions?

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