

## **Village Resources to Help You Plan your Financial Future (cont'd)**

### Raymond James "Aging and Its Financial Implications: Planning for Housing"

An average, 36% of income goes towards housing at age 75+ (even though people of that age are likely to own a home without mortgages. Participants in this program received a planning tool booklet, developed by Legg Mason in collaboration with Johns Hopkins and its Center for Innovative Care in Aging. Both group and one-on one sessions were held. For more information, on this resource, click here.

### Tax Laws

Member Judi Strauss held a session to review current tax laws and discuss questions about investments and taxes, medical deductions, required minimum distributions, and estimated taxes.

### The Economy and Markets

Charles Schwab & Co. Financial Consultant, Christopher Grozev, AAMS®, reviewed 2016 market-movers and performance before discussing Schwab's outlook for 2017 and how you should position your retirement portfolio in light of upcoming calendar events.

### Medicare Planning

One-hour individual consultation with a Senior Health Insurance Program (SHIP) trained staff from CJE SeniorLife to help understand Medicare options.

## **Plan Your LifeSpan**

A planning tool to identify future health needs developed in collaboration with Northwestern University's Feinberg School of Medicine. More information here

### Other Resources

The Village maintains an expanding list of vetted resources in these categories:

Accountants

Appraisers

Eldercare Attorneys

Financial Planners

Legal and Estate Planning

Long Term Care Planning

Medical Claims Advocate

Geriatric Care Management