

*Morgan Stanley in collaboration with Transamerica invites you to....*

# Guide to Financial Planning & Dementia



Declining financial skills can be among the first symptoms to appear in the early stages of dementia. Sometimes caregivers assume this job without having adequate experience dealing with financial issues or planning for potential future costs of care. As a result, many can be left wondering where to start.

Transamerica, working with Massachusetts Institute of Technology (MIT) Age Lab, has developed a guide to financial planning for caregivers supporting individuals living with dementia. The guide helps answer questions about funding care and explains how to plan financially for dementia. It explains steps to take in each stage of dementia and reviews helpful questions for caregivers to answer. We invite you to come learn more to help prepare for you loved one's future. This session will be facilitated by Nick Arndt, CFP®, ChFC®, CLU®, RICP® with Transamerica.

**Monday, April 22**

**Noon to 1 p.m.**

**DeWolf Innovation Center  
9000 C Ave NE, Cedar Rapids**

**Registration is required by April 15. To register, call the Family Caregivers Center at (319) 221-8866 or email [fgc@mercyare.org](mailto:fgc@mercyare.org).**

A boxed lunch will be included at no charge.



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