



Welcome!

The Truth about Who Should be on Your Team

Hosts/Moderator:

- Annette & Brett Junell, Downsizing Coaches & Realtors, Junell Realty Group – Retired Moves Division @ Keller Williams (775) 432-6300

Panelists:

- Juliana Hart, Allstate Financial Services (775) 750-9680
- Barbara Seiler, Revel Rancharra (775) 300-6200
- Stacey Taylor, Clearwater at Rancharra (775) 900-0319
- Mark Regan, Cascades of the Sierra (775) 424-5400

Who Is On Your Team – Your “We”!

<p><u>Finance</u></p> <ul style="list-style-type: none"> • Financial Advisor • CPA <p><i>Assets / Bank & Retirement Accounts / Statements / Passwords</i></p> <p>Who: _____</p>	<p><u>Legal</u></p> <p><i>Will, Trust, Powers of Attorney, Health Care Directives, POLST,</i></p> <p>Who: _____</p>	<p><u>Health & Medical</u></p> <ul style="list-style-type: none"> • Primary Care Physician <ul style="list-style-type: none"> ◦ Other physicians • Medicare Advantage Plan <p>Who: _____</p>
<p><i>This is just a starting list. Be sure you have communicated with each person and they know and agree to their role. Have everything written down and ensure someone knows where to find needed information.</i></p>	<p>ME</p>	<p><u>Family</u></p> <ul style="list-style-type: none"> • Adult child, sibling, niece, nephew, grandchild <p>Something happens? Where to find wishes? Who to call?</p> <p>Who: _____</p>
<p><i>Book suggestion from panelist Barbara Seiler:- Be Your Own Hero: Senior Living Decisions Simplified Paperback by Catherine L. Owens</i></p>	<p><u>Education:</u></p> <ul style="list-style-type: none"> • One or more WHO's on this page • RLTS & Sponsors • AARP (800) • Senior Living Communities • UNR/Sanford Center for Aging <p>Who: _____</p>	<p><u>Trusted Advocate</u></p> <ul style="list-style-type: none"> • Friend • Case Manager <p>Who: _____</p>

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