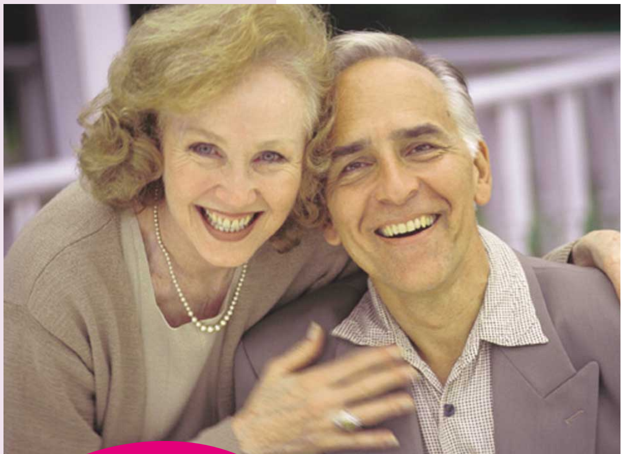
Marilee Driscoll

Long Term Care (LTC) & Age 50+ Finances



These speeches are for <u>individuals</u> looking for information for themselves and/or their parents, and for <u>professional advisors</u> (tax preparers, financial planners, trust officers, insurance agents). CE, CPE available.

All programs updated for 2006 Deficit Reduction Act

"Your program is consistently rated by attendees as 'excellent,' the highest rating available."

Lucian P. Gauthier, Esq., CPA
President
Boston Tax Institute Ltd.
Massachusetts

Long Term Care for Advisors and Their Clients

Designed for professionals who are asked about long term care planning by their clients — or who are interested in the topic for themselves and their families. Soup-to-nuts — we go through all the financing options (including Medicare, LTC insurance and Medicaid planning), and understand the pluses, minuses, and tax implications of each. Includes the history of long term care, including Medicare and Medicaid, and the current state of LTC insurance and proposed Congressional legislation.

6 by 60™ Six critical but little-understood personal financial and life planning strategies. Learn the six things that you must do – by age 60 – to have a secure and worry-free retirement. You've never seen this list before, but, boy will you be glad that you did! Includes resource list so that you can easily follow-through on the ideas presented here. After all, what good is a great idea if you don't know how to follow through with it?

Help with Aging Parents: LTC Planning Whether There's TIME to Plan, or NO TIME to Plan No matter what your age, health or financial situation, there are steps that you can take to increase your quality of life if you need long-term care. Learn the best practices in personal long-term care planning, and the pluses and minuses of each. (Recommended booklets for attendees.)

"Our members especially appreciated Marilee's direct professional yet personable approach."

Thomas J. Casey, CFP
President
FPA-CT
Fairfield County
Chapter

"WOW! The feedback from your presentation earlier this week has been great!"

Ronald P. Millman, Sr.
Manager
Education and
Development
MIB

Long Term Care: The Problem Explained. The Choices Made Clear.

Marilee Driscoll is the author of ***The Complete Idiot's Guide to Long-term Care Planning*** and the founder and national spokesperson for Long Term Care Planning Month (www.LTCmonth.com). She has been quoted in hundreds of publications, including the *Wall Street Journal, Money* magazine, the *Chicago Sun*, the *Washington Post, Bottom Line Personal* and *Kiplinger's Personal Finance*. She has also been a guest on the CBS Early Show, Comcast's syndicated Money Matters, and dozens of radio programs. In addition to extensive personal experience with long term care, Marilee oversees marketing for a skilled nursing facility and adult day health program. Marilee has written extensively on the topic, and been published by magazines such as *National Underwriter, Senior Market Advisor,* and the peer-reviewed *Journal of Financial Planning*. Marilee holds her CLU designation from the American College.

LONG TERM CARE
PLANNING MONTH℠
October
www.LTCmonth.com

Clients include...

Medical Information Bureau
Citigroup
FPA (Financial Planning Association)
Toyota
Boston Bar Association
Allianz
Northwestern Mutual Life
Boston Globe Money Matters Conference
State Street Bank
Boston Tax Institute
Society of Certified Senior Advisors

For more information or to book Marilee...

Call **508-830-9975** or email **md@MarileeDriscoll.com**
www.MarileeDriscoll.com