

CASE STUDY

Home Care



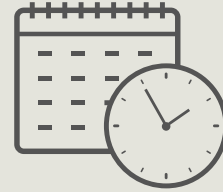
Meet John

Meet John, a 65-year-old who was recently diagnosed with Parkinson's. John has lost stability and requires assistance with bathing, dressing, and grooming. John feels that with 20 hours of assistance, he could stay in his home. With many years left to live, John fears he will outlive his money, and have nothing left with which to hire in-home care, let alone leave anything for his kids.

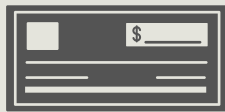
How JacksonWhite Can Help



Prepare a gifting strategy under which John gifts enough of his available assets to qualify for ALTCS.



Guide John through a penalty period, during which time he will pay privately for care.



John gets to keep his monthly income while receiving the ALTCS benefits at home.



Ensure that John rolls seamlessly onto ALTCS when his penalty expires.

*planning for married people works similarly and effectively, as well.

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