Clients living with Alzheimer’s and other dementias need help creating strategies for the financial ramifications associated with this condition.

By taking time to help, you’re responding to their needs with compassion. You’re also further demonstrating your value to your clients, earning their trust, and developing relationships that can overlap generations. Here are three other reasons why dementia matters to you:

**IT ALREADY AFFECTS YOUR PRACTICE**

An estimated 5.8 million Americans are living with Alzheimer’s disease.* This means it’s not if, but how many of your clients will be affected.

**YOU’RE ON THE FRONT LINES**

Research shows declining financial skills are among the first symptoms to appear in the early stages of Alzheimer’s, meaning you might notice there’s a problem before others do. Also understand that clients living with the disease are prone to money mismanagement and elder fraud.

**IT’S AN URGENT MATTER**

Alzheimer’s and other forms of dementia are progressive. Your client will never get better; symptoms will only worsen. The earlier planning begins, the more involved your client will be in the process. It’s important to understand the window is shrinking to ensure your client’s financial and legal plans align with his or her wishes.

*2019 Alzheimer’s Disease Facts and Figures, Alzheimer’s Association, 2019

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RESOURCES

ACADEMIC SUPPORT

Through our collaboration with the Massachusetts Institute of Technology AgeLab, we’ve developed comprehensive pieces designed to help you work with clients and families on preparing for the costs associated with Alzheimer’s disease and other causes of dementia.

Insights from the Alzheimer’s Association® and Certified Financial Planner® Steven A. Starnes, who specializes in working with families affected by dementia, have also been valuable.

EDUCATIONAL MATERIALS

Transamerica is dedicated to creating quality educational tools to help you enhance your practice. Our award winning Field Guide to Financial Strategies for Those Living with Dementia series exemplifies this commitment. Our Field Guides for financial professionals and caregivers serve as the foundation for the series, which features a robust library of pieces, including:

- Educational seminars
- A toolkit that provides checklist, resources, and conversations starters
- Blog posts, videos, infographics, and more

To learn more about Transamerica’s Field Guide to Financial Strategies for Those Living With Dementia series and to get support materials:

Visit: transamerica.com/dementia
Contact: Your Transamerica Wholesaler

*Our program (Previously titled “Financial Planning in the Shadow of Dementia”) has won the 2016 Insured Retirement Institute (IRI) Individual Award, 2016 Business Marketing Association (BMA) of Colorado gold award for Best Strategy, the 2016 Global Aegon Award for Best Community Engagement, the 2016 Wealth Management Award for Insurance Service category, and the 2016 Mutual Fund Education Alliance (MFEA) Star Award.

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