

Financial Planning

Programs that involve counseling from a financial planner to invest your assets and/or plan for the future financially.

Links

Aging in Place: Your Home, Your Community, Your Choice

Learn more about the essentials of a successful plan using the materials available on this web page. Topics covered include: housing, health and wellness, transportation, personal finance, and social connections and growth.

Source

[Aging in Place: Your Home, Your Community, Your Choice](#)

Article

What You Can Do to Prevent Caregiver Fraud

Expert tips on hiring home care wisely and protecting loved ones from financial abuse.

Source

[AARP](#)

Article

Technology Tools to Help Guard Against Elder Financial Abuse

Be aware of the risk of financial exploitation for older adults and learn about technology tools to help. AARP identifies websites and companies that can help you flag suspicious behavior and put up financial guardrails to protect your assets.

Source

[AARP](#)

Links

Fintech Financial Resources from AARP Foundation and Chase

Source

[Fintech Financial Resources from AARP Foundation and Chase](#)

Links

AARP Foundation: Financial Health

Source

[AARP Foundation: Financial Health](#)

Article

Financial safety: The often forgotten piece of disaster preparedness

After a natural disaster, having access to personal financial, insurance, medical and other records can help people starting the recovery process quickly. There are a few things taxpayers can do to help protect their financial safety in a disaster situation.

Source

[Internal Revenue Service](#)

Article

Truist: Money and Mindset

Truist provides tips and tools to help you address your money management goals.

Source

[Truist](#)

Links

Truist Money and Mindset: Resources and Podcasts

Source

[Truist Money and Mindset: Resources and Podcasts](#)

Article

Paying for Long-Term Care

Many older adults and caregivers worry about the cost of medical care. These expenses can use up a significant part of monthly income, even for families who thought they had saved enough.

Source

[National Institute on Aging](#)

Article

5 tips for long-term retirement planning

Financial tips for saving and planning for retirement.

Source

[Truist](#)

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