A Lifetime of Support – Comprehensive Financial Planning

John Borchers, CFP®

Michael Wilkison
What is Comprehensive Financial Planning?

Additional Details: www.letsmakeaplan.org
Where do I start?

Begin by:
• Talking with a professional who’s knowledgeable about the issues you face

• Qualities these professionals should include:
  – **Fiduciary**
  – Transparency
  – Competence
  – Experience
  – Organization

• Involving your entire family

• Working together to put a financial strategy in place
Get the help you need through a teamwork approach
Additional Resources


PPMD Website > Care > For Families > Transition of Care Through Adulthood

Topics include:
- “Timing of Transition Planning”
- “Why Transition Planning is Important”
- “What should the plan include?”
- “Care Coordination”
- “Medical Care”
- “Education, Employment, and Pursuit of Vocations”
- “Transportation/Housing/Assistance with Activities of Daily Living/Personal Relationships”
THANK YOU!