

# CASSADAY & COMPANY SUPPORT SERVICES

## WE'RE WITH YOU THROUGH LIFE'S TRANSITIONS

In our experience, as individuals move through various stages of life, their needs change and often become more complex. At Cassaday & Company, we believe proactive planning helps to mitigate some of the challenges that come with retirement and aging. It is our responsibility to ensure you are making sound decisions now to protect your future. We provide a comprehensive array of services to reduce the concerns you may have about facing these challenges on your own. Some of these services include:

### Social Security Analysis

We realize that decisions around Social Security are complex and can be confusing for retirees. Choices regarding benefit structure and timing, as well as spousal considerations, can significantly impact the amount of money generated over a retiree's lifetime. As your Financial Advisor, we provide tools you can use to make decisions about what is in your best interest.

### Medicare & Private Healthcare Planning

As healthcare costs continue to rise, Medicare plays a vital role in your healthcare needs and retirement plan, whether it is your only health plan or it is supplemental to your primary coverage. As you approach the eligibility age of 65, it is essential to understand the various components of Medicare in order to make the right choice for you. We will guide you through the intricacies of the Medicare landscape and will refer you to trusted independent experts to supplement your healthcare coverage as needed.

### Assessment of Continuing Care Communities

From amenities and costs to healthcare provider access, the options for continuing care communities continue to increase. Our financial planning staff will assist you in evaluating the appropriate options in order to help you find the best community to meet your specific needs.

### Assistance with Life & Long Term Care Insurance Claims

It is never easy to deal with the loss of a loved one or with deteriorating health, but when things like this happen, we are here to guide you through life and long term care insurance claims. As the insurance claim process can be lengthy and involved, having the support of an experienced team will make the experience more seamless and less burdensome.

### Relocation Planning - Downsizing & Estate Sales

When choosing to simplify life by moving to a smaller home or retirement community, we work with reliable professionals to guide you in making the transition efficient and less overwhelming. These providers specialize in areas such as personal organization assistance, estate sale guidance, moving services, and more.

### Eldercare Coordination

When it comes to independent living and working with many service providers, there are a lot of moving parts to manage. We partner with eldercare specialists to assist you with the coordination of the services you need, including housekeeping, in-home nursing care, security monitoring, meal providers, transportation, etc.

### Bookkeeping & Bill Payment Management

As people age, managing expenses can become very complex. We work with trusted experts who can help you take control over your bookkeeping and bill payments.

### Memory Care & Managing Cognitive Challenges

The challenges of cognitive decline not only impact you, but can affect your family and friends as well. Our community of dependable experts offers extraordinary services to help you understand and best manage these challenges. These specialists will connect you to centers that provide educational programs, support groups, consulting services, individual consultations, and direct support for caregivers. Our staff is trained to recognize warning signs of cognitive decline, and due to our ongoing contact with clients, Cassaday & Company can be a primary source of support to take appropriate actions.

**For more information on these and other services that Cassaday & Company provides, please contact your Financial Advisor at 703-506-8200.**



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