

Why dementia matters to you

Helping protect wealth for an aging America



Clients living with Alzheimer's and other dementias need help creating strategies for the financial ramifications associated with this condition. So do their families.

By taking time to help, you're demonstrating your value to your clients, earning their trust, and developing relationships that can overlap generations. Here are three other reasons dementia matters to you:

It already affects your practice

In 2023, 11.5 million Americans provided unpaid care for people living with some form of dementia, including Alzheimer's disease, which affects an estimated 6.9 million Americans as of 2024. By 2050, this number is projected to double.* All of them will be affected financially.

You're on the front lines

Research shows declining financial skills are among the first symptoms of Alzheimer's,** and clients with the disease can be prone to money mismanagement and elder fraud. Your clients need you. Asking the right questions is imperative to help protect their wealth and help their caregivers support their needs, so your clients can continue to live with dignity and respect.

It's an urgent matter

Alzheimer's and other forms of dementia are progressive. Early planning helps ensure your clients' and their caregivers' wishes will be met. It also puts you in a stronger position to help caregivers build strategies for providing the best care possible, without sacrificing the caregivers' own financial security.

* "2024 Alzheimer's Disease Facts and Figures," Alzheimer's Association, 2024

** "Managing Money Problems for People with Dementia," National Institute on Aging, October 2023

Resources

Academic support

The award-winning* *Field Guide to Financial Strategies for Those Living with Dementia* series exemplifies Transamerica's commitment to helping you enhance your practice by serving a client's entire family.

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 dementias.

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



Financial professional tools

The robust *Field Guide to Financial Strategies for Those Living with Dementia* series includes:

- Educational seminars
- A toolkit with a checklist, conversation starters, and resources
- Articles and more



To learn more:



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* 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.

Transamerica is a proud sponsor of the MIT AgeLab.

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