

Senior Financial Health Threatened

Seniors are quickly becoming one of the country's largest demographic and their financial health is threatened

Seniors appear financially secure



Assets Held



Own Homes



Average Income

Rising expenses leading to increasing debt

Estimated medical costs
(2002 - 2012)



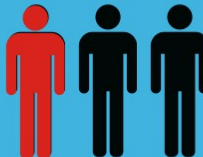
% seniors holding debt
(2001 - 2011)



Seniors becoming financially vulnerable



Economically
Vulnerable



Economically
Insecure



Can't Endure a
Financial Shock

Tips to improve senior financial health



Maximizing Benefits

Find available benefits - Seniors have many benefits available to them but need help searching for and activating them.



Financial Caregiving

Have the money talk - Family members are increasingly stepping in to help senior loved ones manage money activities and financial planning.



Investment Products

Consider financial products to boost fixed income - Annuities and reverse mortgages are designed specifically for seniors needing more income.

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