



MATT MURPHY

CLIENT: Elder Life Group
PROJECT: Corporate website
OBJECTIVE: Develop new copy for a national healthcare- and retirement-planning group's refreshed website
SUMMARY: Pleased with collaboration on various print and above-the-line materials to date, Elder Life Group retained me to update its site-wide copy as part of a full design overhaul
WEBSITE: <https://www.elderlifegroup.com/>

Protect Yourself, Your Assets, and Your Family from the High Costs of Aging

Elder Life Group specializes in healthcare and retirement planning. Your search for highly-qualified financial and legal guidance is finally at an end.

[Schedule a Free Discovery Call with an Advisor](#)



Affording long-term care is one of the biggest risks facing Americans during retirement. It also happens to be one of the most challenging forms of financial planning out there. The layers of state and federal policy alone are enough to discourage even the savviest investor from finding ways to prepare for the high cost of aging.

The good news is that you do have options. The better news is that you don't have to figure them out alone.

Why Elder Life Group?

Elder Life Group is a leading financial services provider specializing in healthcare and retirement planning. Our advisors work with law firms, insurance professionals, and financial institutions across the country to protect our valued seniors from the high costs of aging.

We find options, you find peace of mind.

[Learn More](#)



At Elder Life Group We Specialize In Healthcare and Retirement Planning Services

Proper Preparation Reduces Risk and Increases Quality of Life

From nursing homes to final expenses, it's never too early to start planning for life's later costs. We offer various ways to manage these costs while safeguarding your savings for posterity.





Asset Protection Financial Strategies

Your health and wellness can be unpredictable. So can the stock market. The last thing you want to do is jeopardize your ability to handle the "what ifs" of later life by playing the "what ifs" of Wall Street. Our advisors eliminate market risk so you can enjoy the rewards you've earned.

[Learn More About Asset Protection](#)

Medicare Planning for Secure Coverage

Like Medicaid, Medicare is government-funded. You've already paid for its benefits through your tax dollars, but those benefits are limited and often need to be supplemented by private plans. We take the guesswork out of this complex equation to ensure you're safely covered.

[Learn More About Medicare Planning](#)



Prepaid Funeral Arrangements

Nobody likes to think about their final expenses. But, nobody likes to put their loved ones in a tough position during an emotional time, either. As the leader in prepaid funeral solutions, we set aside funds for this in a trust that's federally protected from creditors like nursing homes.

[Learn More About Prepaid Funerals](#)

Long-Term Care Pre-Planning Strategies

Simply put, aging is expensive. Roughly 70% of people will need some sort of long-term care in their later years. Costs can top \$10k per month and are only growing each year. Our advisors are experts in creating hybrid plans that transfer risk early without compromising your estate.

[Learn More About Long-Term Care](#)





Medicaid Planning for Government Relief

Most Americans have heard of this program, but few understand how it really works. If you don't properly plan for specialized care, federal aid may not be an option when you need it. We help you speed up eligibility for benefits while limiting out-of-pocket expenses.

[Learn More About Medicaid Planning](#)

We Offer Expert Legal Support

At Elder Life Group, sound financial planning goes hand-in-hand with reliable legal counsel. We work closely with your legal team to guarantee your plan does what it's designed to do including:

- [Asset Integration for Estate Plans](#) →
- [Trust Administration Support](#) →



Asset Integration for Estate Plans

Estate planning can be delicate. Fortunately, we work with law firms around the country who recognize that we are just as committed to their clients as they are. When your financial and legal partners trust one another to do what they do best, you come out on top.

[Learn More About Asset Integration](#)

Trust Administration Support

In most cases, setting up and funding your trust is up to you. In all cases, administering it is not. This falls to your beneficiaries when the time comes. Our team and your family's attorneys make sure nothing's overlooked in a complicated process during a trying time.

[Learn More About Trust Administration](#)



National Cost of Care

Healthcare expenses in the US are formidable. Monthly costs can easily exceed \$10k out of pocket depending on your state and situation. At this very moment, many Americans are paying six figures per year toward proper medical attention for themselves or their loved ones.

Understanding the financial realities you may be facing is a key step in determining your options to manage them.

You can check the current cost of healthcare where you live in seconds.

CLICK ON THE INTERACTIVE MAP:
Click on a State to See Your Cost of Care.



Elder Life Group Client Success Stories

We've guided thousands of people to financial peace of mind over the years. Don't take our word for it, though. See for yourself what we've accomplished for others in your shoes. We want you to be confident that we can lead you where you want to go.

Alzheimer's Care Jeopardizes Family Estate



Case Study: Barbara

Elder Life Group Reduces Medicaid Spend-Down by Over 70%, Protecting More Than \$1M in Family Assets

[Download Now](#) **Yours FREE!**

Assisted Living Threatens Family's Limited Savings



Case Study: Steve

Elder Life Group Turns 99% Spend-Down for Medicaid into 72% Savings Across Entire Estate

[Download Now](#) **Yours FREE!**

Modest Finances Cannot Meet Healthcare Needs



Case Study: Helen

Elder Life Group Preserves Family Estate From Assisted Living Without Any Prior Advanced Planning

[Download Now](#) **Yours FREE!**

Memory Care Facility Places Family Estate at Risk



Case Study: Tom & Susan

Elder Life Group Offsets 55% Medicaid Spend-Down Requirement to Fully Protect 75% of Family Estate

[Download Now](#) **Yours FREE!**

We're Ready When You Are

The high costs of aging are real. Fortunately, so is your ability to meet them. The key is knowing how to plan and starting right away.

Reach out today for a no-obligation conversation with an Elder Life Advisor. We look forward to giving you and your family the options you need for the peace of mind you deserve.

[Let's Talk About Your Options](#)



The Time is Now to Protect Against the High Costs of Aging So Your Golden Years Stay Golden

[Download Now](#) **Yours FREE!**



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A Little About Elder Life Group

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About

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About Elder Life Group

Our experts ensure that your golden years stay golden.

For decades, our leaders have seen what happens when seniors don't account for the high costs of aging. The wealth they've worked so hard to accumulate over a lifetime can all but vanish due to long-term care expenses.

Traditionally, seniors have had few places to turn for help. Typical advisors rarely have the training to offer proper guidance in this area. Online "experts" largely publish information that's either irrelevant, indecipherable, or outright wrong.

So, when Scott Moan opened Elder Life Group's doors in 2017, he did so with a single goal in mind: Bring financial peace of mind to those who need it most.

Scott put together a team specializing in helping Americans prepare for costs they'll encounter later in life. This includes individuals planning ahead and those facing an unexpected crisis. Peace of mind is possible in the hands of innovative advisors who use innovative products.

Our acquisition of Delco Estate Planning in 2019 strengthened this line of products even further. Delco was instrumental in the evolution of what is now widely known as the Medicaid Exempt Funeral Trust. The trust protected hundreds of millions of dollars from creditors and predators in its first 10 years alone. Just as importantly, it ensured that thousands of families had funeral arrangements already in place during a difficult time.

Today, Elder Life Group is the largest distributor of this trust in the US and offers numerous other strategies to safeguard your assets. We've built a national network of advisors and attorneys to provide you local support. They each specialize in creating plans based on your state's laws and economic policies.

We look forward to helping you make informed financial decisions to keep your golden years golden.

[Explore the Financial Options You Deserve](#)



"We take great pride in helping families discover options they never knew they had. That's what Elder Life Group is all about. We're here to make sure you receive the right financial and legal care no matter where you are in your planning. Our only interest is your best interest."

- Scott A. Moan, LUTCF

**Founder and Managing Director,
Elder Life Group**



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Asset Protection

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Asset Protection Financial Strategies

Let's preserve what you've spent a lifetime earning.

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The Importance of Asset Protection

Retirement is a reward to look forward to after a lifetime of providing for your loved ones. Unfortunately, right about the time your primary source of income ends, the need for it becomes ever greater as medical needs grow. The costs of long-term care today are large enough to endanger everything you've put away for your future and your family.

That's why transition out of the workplace requires transition into a new mindset. Financial strategies for most people must be very different in their later years. The gambles traditional advisors take with the stock market are no longer safe. Risking your principal also risks your ability to care for your welfare down the line.

Our Approach to Protecting Your Assets

As you age, return on investment should give way to retention of investment. Our financial advisors and legal partners guide the shift from asset appreciation to asset preservation. We secure your investments from the uncertainties of Wall Street to guarantee your savings no matter what life may bring.

Our process begins with a free consultation to offer you one thing: options. To do this, we conduct a confidential review that takes into account critical factors other advisors aren't trained—or incentivized—to examine.

Our review includes things like:

- Long-term income strategies
- Short- and long-term financial goals and concerns
- Spending habits in light of potential long-term care costs
- Countable and non-countable long-term care resources
- Market risk with corresponding protection options

The result is a customized financial analysis that we can then use to guide you to the right legal partner for modern estate planning.



Get Started Today

There's no fee or obligation for our review. We'd simply like to show you options to safeguard your assets that you won't find anywhere else. Your Elder Life Advisor is ready when you are.

[Request a Free Consultation](#)

Investing for People Over 50

- In a recent study 75% of investors said it's important for people over 50 to have a strategy to protect portfolios against loss.

Are YOUR investments protected from market loss?

SOURCE: Greenwald & Associates Guaranteed Lifetime Income Study, 2020

Market Ups and Downs

- Since 1929 a bear market has hit every 3.6 years.

Are YOU prepared for the next bear market?

SOURCE: Invesco Bull & Bear Markets Historical Trends and Portfolio, May 2019

Declining Interest Rates

- The national average rate for a 5 year CD is 0.28%.

Are traditional banking guarantees still a planning consideration?

SOURCE: The Federal Reserve and CD Rates, October 2021

Medicare Planning

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Medicare Planning for Secure Coverage

Simplify a complicated program to ensure the right solution for your needs.

[Speak With an Elder Life Advisor](#)


Original Medicare. Medicare Supplements (Medigap). Advantage Plans.

All of these things and more are a lot to keep track of and quite intricate, to say the least. But, for seniors and individuals with certain types of disabilities, it's incredibly important to have a grasp of this critical healthcare program.

Our Approach to Evaluating Your Coverage Options

With Elder Life Group, you don't need to take this risk. We operate in this space every single day and know how Medicare coverage works with hospital insurance (Part-A), medical insurance (Part-B), prescription drug plans (Part-D), privately-sold advantage plans (Part-C), and hospital indemnity plans.

Our specialty isn't just in understanding federal and private programs, though. It's in helping others understand them, too. **Working with an Elder Life Advisor is a reliable alternative to seeking solutions on your own** for a number of reasons:

- We take the time to assess your existing plan to see if it's meeting your needs in the most cost-effective way.
- As an independent company, we're able to shop multiple carriers to find the best options on your behalf.
- We can readily weigh the advantages and disadvantages of new strategies in light of your healthcare goals.
- We're well-versed in discussing the differences between supplements and Advantage plans without the jargon.
- We review prescription plans annually to uncover more suitable ones that may be available in your area.

In short, you have an expert partner whose only goal is to pair the right options with your needs.

Get Started Today

The simple truth is that healthcare in retirement becomes far more complex than the traditional plan you've had for years. Let us handle the legwork so you can enjoy the carefree life you've earned.

[Request a Free Consultation](#)

The tough part is that there's no shortage of myths being perpetuated about Medicare. For instance:

- "Medicare coverage begins automatically when you turn 65" (not always)
- "Medicare is free and will handle all of your healthcare needs" (it doesn't)
- "Medicare pays for all nursing home costs" (there's a limit)
- "Medicare plans are all priced the same" (they aren't)
- "Medicare supplements and Advantage Plans are identical" (they aren't)

Trying to separate fact from fiction is risky if you're unfamiliar with the healthcare landscape.

Prepaid Funeral

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Prepaid Funeral Arrangements

Guarantee your final expenses now, protect your family later.

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The Importance of Considering Funeral Arrangements

Most people, understandably, don't like to think about their own final expenses. Many choose to simply prepay them with a funeral home and be done with it. The decision to remove an expensive burden from their loved ones is a thoughtful one. But, it's also fraught with potential dangers that don't surface until it's too late.

Traditional prepaid funerals aren't guaranteed. Funeral homes may go under, the funds may be exposed to creditors, and so on. Even if you believe your estate can handle the expenses later, it may have to go through a lengthy probate process. The result is a stressful situation for your family during an already-emotional time.

Our Approach to Securing Your Funeral Arrangements

Fortunately, there's a solution that puts concerns about affording burial costs to bed: the Medicaid Exempt Funeral Trust. This is a combination of a small, guaranteed-issue life insurance policy that is irrevocably assigned to a free trust. It transfers all risk to the insurance company, which then pays the funeral provider on your behalf. The trust even speeds up Medicaid eligibility by spending down your countable assets.

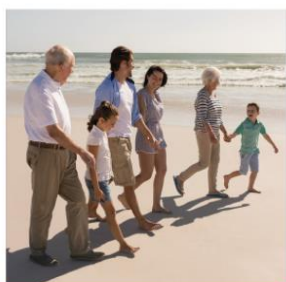
Not only are we the largest distributor of this funeral trust in the nation, but we've been actively involved in its continual improvement. We've made it easy to secure by anyone in just a few quick steps.

- Final Expenses Evaluation:** First, we understand your financial situation. We can do this conveniently over the phone, and you can even take care of all the paperwork electronically. Qualification is simple, which makes it easy to go right into a custom plan.
- Customized Plan:** We tailor a plan to your needs based on your state's rules. This is completely confidential and takes a matter of minutes with an Elder Life Advisor, not hours with a funeral-home director.
- Start Your Policy:** All we need is your name, phone number, and SSN—no medical details or other personal information. Simply write a check and never worry about your final expenses again.

Elder Life Group Funeral Trust Benefits

- 100% Free:** No fees up front or tax on any excess back to your estate.
- Convenient:** Conduct the entire policy-writing process from home.
- Guaranteed:** Assets are protected for the sole use of your final expenses.
- Immediate:** Probate-exempt, allowing for prompt funeral-provider payment.
- Irrevocable:** Guaranteed to be safe from creditors and predators, period.
- Portable:** Applicable to any funeral home in the US.
- Predictable:** Policy value grows steadily to account for rising market costs.
- Strategic:** Reduces your assets to accelerate government benefits.

Learn More Today



[Download Now](#)

Yours FREE!



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Yours FREE!

Get Started Today

Elder Life Advisors know exactly how much you should put aside so you don't under-prepare or over-spend. Call us today to see how a prepaid funeral trust can benefit your retirement plan now and your family later.

[Request a Free Consultation](#)

Long-Term Care Pre-Planning

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Long-Term Care Pre-Planning Strategies

Confidently prepare for the high costs of aging before they become a concern.

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The Importance of Long-Term Care Pre-Planning

Life-expectancy rates continue to increase thanks to ever-improving medicine and technology. As wonderful as this is, it also increases the likelihood and ultimate expense of long-term care. The costs of nursing homes can exceed \$100k per year and are only growing. That's why it's crucial to plan for issues that are as unpredictable as they are expensive while you still can.

Unfortunately, this is easier said than done. Eligibility requirements, trust-compliant coverage, government policies and penalties—all of these considerations and many more can be maddening to navigate. Poor guidance from untrained advisors only intensifies stress on retirees and their families.

Our Approach to Your Pre-Planning Options

Good guidance, on the other hand, removes this stress right now and gives you peace of mind regardless of the “what ifs” down the road. **Elder Life Advisors are experts in protecting your estate** in the event of sudden, steep medical costs, especially if Medicaid won't be an option.

To do this, we use hybrid long-term care solutions that transfer risk to insurance companies. These policies offer many advantages to you and your family.

Our advisors can speak to these benefits and others along with the options they create for you. And the best part is, with our hybrid long-term care policies: If you ever change your mind, you can get your money back.

Get Started Today

Even if you're perfectly healthy now, it's never too early to start planning with the help of hybrid solutions like this. We're here to put safeguards in place so you can enjoy the life you've earned, not worry about whether you can afford it.

[Request a Free Consultation](#)

Elder Life Group Long-Term Solutions

- Home and facility care along with other services are covered so you stay independent.
- No deductible or elimination period for benefits to begin once you're eligible.
- Inflation options maintain the power of your investment as market costs rise.
- Policy cash value increases each month with interest credits and tax-deferred growth.
- Single-, extended-, and flexible-payment options keep premiums manageable.
- The insurance company pays service providers directly on your behalf.
- You can still receive benefits even if you spend your retirement abroad.
- Any unused portion of your monthly maximum benefit extends your benefit period.
- Your beneficiaries receive an income-tax-free legacy if you never need long-term care.

Medicaid Planning

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Medicaid Planning for Government Relief

Write your own rules to get the benefits you've already paid for.

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The Importance of Planning for Government Relief

Even if they're healthy today, most retirees will need long-term care at some point. Seven in 10 Americans will spend an average of two to three years in a nursing home or assisted-living facility. Medicare will help, but it's very much a temporary solution. It lasts only a few months, assuming you meet various conditions to receive it in the first place. Without a plan for what to do when it ends, you'll then have to cover any costs the government doesn't.

The good news is that Medicaid can be a great source of relief for families. If you can get through the maze of fine print, that is. Medicaid is a federal program funded by your taxes and administered by your state. This means national and local laws come into play, creating eligibility requirements that are literally all over the map.

Since Medicaid pays roughly 80% of all long-term care costs, you want to receive the benefits you're owed while protecting the assets you've earned.

Our Approach to Helping You Take Control of Your Plan

Qualifying for Medicaid is as much a financial matter as it is a medical one. We help families whose seniors are immediately eligible as well as those whose countable assets don't allow them to receive this relief. Having a national network means we can provide local expertise for families in either scenario.

Our services range from strategic guidance on asset reallocation to hands-on support with your application. Beginning with a free intake call, we gather the information we need and then explain everything you need to know about your options.

By the end, you'll have the beginnings of your own rule book to secure the benefits you need on your terms.

Explore Your Options Today

Why worry about the frustrating ins and outs of government policy when you can rely on professionals who specialize in it? Our experts are ready to put you in a position of strength when it comes time to claim your benefits.

[Request a Free Consultation](#)

Medicaid Myths

"Going on Medicaid means my spouse and I will lose everything we have." (You won't)

"Before you go on Medicaid we should give all our money away to our kids or family, so the government doesn't get it." (Not always a good idea)

"I must wait 5 years after giving away anything to qualify for Medicaid." (Not always the case)

"My revocable living trust will protect my assets from a nursing home." (It won't)

"Medicaid is only for lower income or impoverished individuals." (They aren't)

"If I am married and my spouse goes to a nursing home, my spouse can qualify for Medicaid if I put all our joint assets in my name." (They won't)

Asset Integration

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Asset Integration for Estate Plans

We're proud to be your law firm's trusted financial partner.

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The Importance of Asset Integration

Integrating your financial and legal strategies is a critical step in retirement planning. Accounting for so many moving parts requires experts on both sides checking each and every box. Improper execution could have dire consequences for your estate.

- Assets must be moved to fund your trust, otherwise it has no value.
- Incorrectly titling accounts such as IRAs may have huge tax implications.
- Failure to update beneficiary designations could cause inheritance issues.
- Overlooking insured language on certain policies jeopardizes protection.

Our Approach to Integrating Your Assets

We're proud to support estate planning attorneys across the US in creating airtight plans for their clients. **Our specialists go far beyond basic paperwork and administrative details.** They understand how financial products work with legal strategies, making them hands-on partners throughout the process. The result is a holistic planning experience offering security and assurances for your family's future.

Get in touch with an Elder Life Advisor today to learn more about how we work with your law firm to complete your estate plan.

[Schedule a Call today](#)

For Law Firms

Like us, you want to offer your clients premium service every step of the way. Our industry experts help you do that while also taking much of the tedious-but-necessary work off your plate. Let's discuss how we can work together to improve your clients' experience even further.

Trust Administration

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Trust Administration Support

Where legal teams turn for reliable help with their clients' trusts.

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The Importance of Trust Administration

Properly establishing and funding your trust is fundamental to asset protection. Competently administering that trust when the time comes is just as important. But, distributing assets to your beneficiaries in the way you intend can be complicated. There's a lot of paperwork involved, and the steps must be followed precisely.

Poor administration could lead to lengthy delays or, worse, litigation issues. There's even the possibility of exposure to various creditors and predators. These are costly consequences that defeat the purpose of estate planning in the first place.

Our Approach to Supporting the Administration of Your Trust

Legal teams want their clients' beneficiaries to actually benefit. That's why they work with our advisors who understand this complex area. **We bring the expert attention to detail they need to complete the administration process smoothly and securely.**

Our law partners' clients are our clients, which makes your family our top priority. We guide them through everything they need to know in order to carry out your wishes. You've worked hard to provide for the next generation, and we work just as hard to see it through.

Get in touch with an Elder Life Advisor today to learn more about how we work with your law firm to successfully administer your trust.

[Contact Us About Your Trust](#)

For Law Firms

You put exceptional trusts in place for your clients. The last thing you want is to run into complications at the very end on a technicality. We make sure that doesn't happen. Let's talk about what we can do to help you see your clients' plans through smoothly and reliably.



Client Success Stories

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Elder Life Group Case Studies

Success stories featuring clients with diverse backgrounds and needs.

We've guided thousands of people to financial peace of mind over the years. Don't take our word for it, though. See for yourself what we've accomplished for others in your shoes. **We want you to be confident that we can lead you where you want to go.**



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Let's talk about how we can write your own success story starting right now.

[Begin Your Journey](#)

Client Disclaimer:

Client names have been changed for confidentiality purposes. Elder Life Group affiliates, their distributors, and their respective employees, representatives, and/or insurance agents do not provide tax, accounting, or legal advice. Please consult your own independent advisor as to any tax, accounting, or legal statements made herein.



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Cost of Care

home | cost of care

Cost of Care in Your State

Long-term care expenses are steep and only getting steeper.



Calculate Your Projected Costs

Hundreds of billions of dollars are spent each year on healthcare. Even though government benefits and private insurance bear a portion of it, this relief isn't evenly spread. Nor is coverage 100% in many cases.

Although costs vary across the country, there's one universal constant: they are high. To see just how high, select your state for projected expenses in common healthcare areas.

Select State

Please Select

Hourly

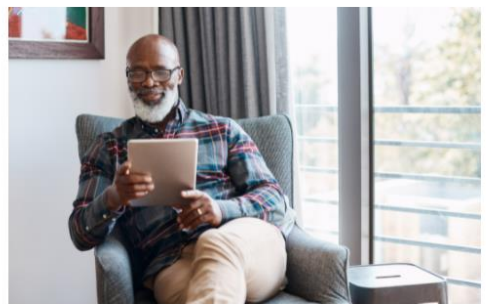
Monthly

Annual

The Time to Plan Is Right Now

Even if you can afford health aides and assisted living, is this really where you want all your money to go? We'll make sure you receive the care you need without depleting your hard-earned assets. Reach out for a free consultation today so we can start writing you a rulebook that guarantees your welfare and your estate.

Plan for Healthcare Costs Now



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Contact Elder Life Group

Long-term peace of mind is just one call away.

It's never too early to start planning for life after retirement. We look forward to speaking with you about how we can ensure your golden years stay golden.

First Name: Last Name:

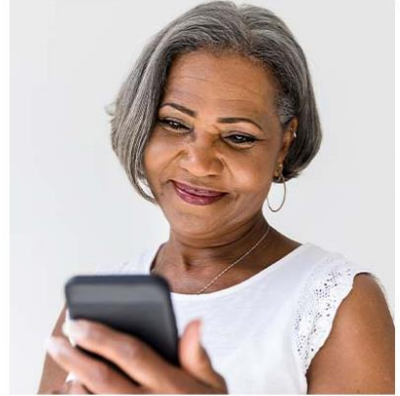
Street Address:

City: State: Zip:

Email:

Phone Number:

Comments:



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Join Our Team

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We're Growing...



Elder Life Group is dedicated to protecting our beloved seniors and their families through specialized planning they can't find anywhere else. We're always looking to grow our team and partner with professionals who share our unwavering commitment.

If you're interested in becoming part of a community that values compassion, service, and trust, **we'd love to talk to you.** Reach out today to learn more about available opportunities at Elder Life Group.

First Name: [input] Last Name: [input]

Street Address: [input]

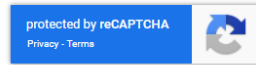
City: [input] State: [N/A] Zip: [input]

Email: [input] Phone Number: [input]

Comments: [input]

Which position(s) are you interested in?

- Sales
- Customer Service



Submit



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info@elderlifegroup.com

A Little About Elder Life Group

Elder Life Group is a leading financial services provider specializing in healthcare and retirement planning. Our advisors work with law firms, insurance professionals, and financial institutions across the country to protect our valued seniors from the high costs of aging. We find options, you find peace of mind.

More About Elder Life Group

Resources

- Join Our Team
- Advisors
- Attorneys
- Contact Us



Become an Advisor

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Become an Advisor

Leverage our unmatched insurance and financial products to grow your practice

Commitment to Superior Solutions for Our Partners and Their Clients

By joining Elder Life Group's network of advisors, you join the most comprehensive healthcare- and retirement-planning team in the market. We're singularly focused on uncovering options for our treasured seniors that they wouldn't be able to find themselves.

Put another way, we give them the peace of mind they deserve.

To do this, we make sure the banks, credit unions, brokerage firms, and other institutions we work with have what they need to offer best-in-class guidance.

- **Cutting-edge products for our partners:** We've designed solutions to maximize asset preservation and government program benefits. Our exhaustive knowledge of the industry allows us to innovate brand-new products that meet evolving healthcare needs:
 - Medicare insurance
 - Medicaid-compliant annuities
 - Prepaid funerals
 - Long-term care insurance
 - Life insurance options
 - Guaranteed investment options
- **Specialized training for institutions:** Traditional planning doesn't work for today's seniors. Our experts teach you how to properly advocate for clients while increasing your revenue. We also provide private workshops to add value to your existing services.

First Name:

Last Name:

Street Address:

City:

State:

Zip:

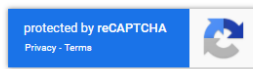
Email:

Phone Number:

Comments:

Which program(s) are you interested in?

- Medicare insurance
- Medicaid-compliant annuities
- Prepaid funerals
- Long-term care insurance
- Life insurance options
- Guaranteed investment options



Visit Us

101 S. Main Street
Suite 200
Janesville, WI 53545

Call Us

877.336.7782

Email Us

info@elderlifegroup.com

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Law Firm Services

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About Our Trust-Funding Specialists

We formally launched trust-funding services in 2019 with the acquisition of Delco Estate Planning, our country's largest distributor of the Medicaid exempt funeral trust. However, our team has long been recognized for its expertise in crisis financial planning for our beloved senior population. When you partner with us, you don't work with paralegals. You work with specialists who go well beyond merely processing paperwork by actively helping families navigate asset protection.

Our funding coordinators are licensed agents across the US and highly competent in Medicaid, Medicare, insurance, and finance. They undergo yearly ethics, product, and anti-money laundering training to maintain exacting professional standards. Their comprehensive understanding of assets lets them quickly identify red flags that could affect planning strategies.

We Simplify Funding for You and Your Clients

Funding doesn't have to be complicated. Our clients count on us for our expertise in pre-planning and funding newly-created asset-protection trusts. We work collaboratively with you and your financial advisors toward our mutual goal: provide the best care for those who deserve it most.

Name of Firm:

First Name:

Last Name:

Street Address:

City:

State:

Zip:

Email:

Phone Number:

Comments:

Which programs(s) are you interested in?

- Trust Funding Services
- Medicaid Exempt Funeral Products
- Estate Administration Support
- Funeral Trust for Special Needs

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