

Financial Security

Pac Con LTD

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Aloha!

I would like to talk with you about your legacy. No - not your estate plan. Your legacy! Who will people say *you* were 25 or 50 years from now?

Every day I work with individuals in planning how they can protect their families and businesses from financial uncertainty. But money is a small part of the legacy we all leave behind - an important part, but not the most important thing.

I invite you to take a walk through some of the articles and comments in this newsletter. And I would like to visit with you individually and really discuss what kind of legacy you are preparing.

Sincerely,

Gary A. Powell

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IRA Legacy Plans



Some of us will need to use our IRA accounts to help finance our

Special Needs Planning

There will always be some adults who will need on-going care for their basic needs and safety. Some are physically challenged and others are mentally challenged. As parents and guardians grow older, the need for care beyond what age will allow becomes more and more evident. Planning inheritance, placing on-going responsibilities on siblings or grandchildren, arranging for institutional supervision, all are vital parts of insuring your loved one will continue to receive the care you wish - even if you are not here to provide or supervise that care. Pac Con LTD works with professionals experienced in designing the right program for you and your loved one.



[5 important steps](#)

Comfort, Security, Independence

CSI - helping seniors with money management -

retirement years. But for others, calculating those minimum distributions becomes more of a headache than a help. New rules allow you to take the IRA distribution and spread it out over more than one generation. In doing so you can create a financial legacy that is much greater than the initial IRA balance.

[IRA Legacy calculator](#)

Passing On Memories



One of my more popular workshops takes you through a fun and entertaining self-interview that will help you leave your memories in a meaningful way. Call to schedule this workshop for

[VISIT THE WEB](#)



Call 808-538-0353

Long Term and a Long Ways Away

Recently, Queens Hospital was reported as having begun to send Medicaid long-term care patients out-of-state for care due to a lack of facility space. As the State becomes fully responsible for the oversight of Medicaid spending, less expensive alternatives out-of-State will continue to attract more and more attention. If you are counting on Medicaid to be your primary source for Long Term Care costs - you might want to reconsider. Planning for your own care, using personal resources, a family financing plan or long-term care insurance is essential to staying as independent as possible. Sign up for our next workshop "**Financing Long Term Care**" to discover some innovative and practical approaches to a very expensive problem.



[Workshop Request](#)

Training and Support

Who Gets it?

Understanding how generations view inheritance and legacies is important. Older generations worked to provide something for the children and future generations. Will the Baby Boomers feel the same way? Where do you stand? Allianz Life did a study on the subject and the results may surprise you!



[Legacy Study.](#)

Find Your Legacy!

What is your legacy going to be? Let's get together and

your group or
association!
808-625-3782

Make It Last!



A proverb states "*a fortune is lost in a generation*" when warning that an inheritance can be spent much faster than it may have taken to acquire.

Spendthrift restrictions are an important part of legacy planning for many. They establish safeguards on an inheritance.

[Important Reading](#)

find out!
Call me at 808-625-3782!

Sincerely,



Gary A. Powell
Pac Con LTD

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