

Irrelevant? MVP? What your clients' families say may surprise you ...

Have you heard the tale of the two Brocks? Brock Purdy is probably a name you're familiar with. He was the very last pick in the NFL's 2022 draft, but unexpected injuries to the first-and second-string quarterbacks took him to starting quarterback for the San Francisco 49ers. He stepped up for his team and quickly went from "irrelevant" to MVP-level status.¹ So, what does that have to do with financial planning?

It's simple. For many clients and their families, a financial professional can quickly become their MVP when a crisis hits.

Coincidentally, another Brock, this time a financial professional, also stepped up into MVP status. His client's family unexpectedly found themselves in a situation where their father had suffered a stroke and was unable to speak at the time. The family had no idea what financial prep work had already been done or where to start, but Brock was ready to help.

You can "be like Brock," too. We're offering a Toolkit packed full of resources to help you and your clients proactively prepare for unexpected life events. The Preparing Client Families for the Future Toolkit includes 10 valuable guides addressing many of the most common issues facing clients as they grow older:

- Why "Be Like Brock" Overview (1 copy)
- Family Money Meetings: 3 Steps to Bring Generations Together (1 copy)
- NEWLY REVISED: In Case of Emergency Guidebook (5 copies)
- 7-Point Checklist to Organize Your Personal Documents (5 copies)
- 41 Questions to Ask Yourself As You Age (5 copies)
- 3 Key Documents to Anchor Your Future Plans (5 copies)
- Additional Document Requirements (5 copies)
- Ostrich vs. Owl: Smart Strategies to Take The Fear Out of Planning for Long-Term Care Expenses (5 copies)
- 7 Steps to Build a Successful Estate Plan (5 copies)
- 5 Ways to Pass Down Family Memories (5 copies)



To request your **FREE Toolkit**, call the Sammons Retirement Solutions Sales Desk at 855-624-0201 or visit my.srslivewell.com/57052.

¹ "Purdy, Bosa among five 49ers named NFL award finalists," nbcsports.com. January 25, 2023. Viewed May 19, 2023, at <https://www.nbcsports.com/bayarea/49ers/brock-purdy-mr-irrelevant-named-finalist-nfl-offensive-rookie-year>.

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