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Undoubtedly, there are clients with enough assets to pay for care should they need it later in life. That said, this may be one of those instances where just because you can, doesn’t mean you should. What’s often missing from the decision making process is the impact of taxes of either an insurance solution or self-funding. Asking one simple question of clients planning to self-fund can lead to more Asset-Based LTC sales.

Interested in learning more? Let’s chat!

#longtermcare #careplanning #taxmanagement