



The world may change.
The way we care *never will.*

What Makes Talking About Money So Difficult?

Thanks to a wide range of social and cultural norms, talking about money is often taboo, even in the best of circumstances. Add in challenges that come with aging, and it's no wonder adult children and their parents typically come up against so many roadblocks.

Why is talking to your elderly parents about money so uncomfortable?

- **Generational differences.** For seniors of a certain age, it's simply never been good manners or accepted to discuss finances with family members. If this is the first conversation you've ever had with your parents about their assets, it's only natural that the discussion may seem awkward and uncomfortable at first.
- **Shame or guilt.** Some elderly parents may not feel that they have been successful "enough." Sadly, they may fear that a discussion about their finances will lead you to that same conclusion.
- **Ignorance.** Your elderly parent may not be aware of how to properly manage their finances. Perhaps they are coping with cognitive decline, or maybe they were never involved with their finances to begin with. If this is the case, it's easier to avoid your questions than deal with the embarrassment they feel from not knowing.
- **Paranoia.** You know you have only the best intentions. But questions about money can seem especially intrusive to a senior who is already feeling vulnerable because of all the other challenges associated with aging.
- **Wanting to remain the parent.** By sharing information about their finances, your elderly parent may fear you will want to take over or try to influence how they handle their money. Most seniors want to stay in control and maintain their independence. As a result, they may opt to avoid the subject as much as possible, saying "Don't worry about me. I'm handling it just fine."
- **Hoping to avoid unfinished business.** Money means different things to different people, and just broaching the subject can activate so-called "old tapes" from childhood, a past job, a failed marriage- you name it. But here's the good news: Once you're aware of this dynamic you can set up the discussion in a way that's the least traumatic.

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Priebe Investment
Plans invites you to a



On Tuesday,
August 25th,
12 noon

Live via
ZOOM!!

We invite you to join us in our Fort Lauderdale office for an educational presentation.

Topic:

**Education Planning:
Which Plan is
best for you?**

Join us for a friendly discussion. **Bring your spouse, neighbor or friend.** Walter Priebe will have a short presentation and will be available to take any questions. Seating is limited. Lunch will be served.

Please call our office, 954.974.3266 to reserve your seat or to get a link to the LIVE zoom meeting.

Office Address:

2933 W. Cypress Creek Rd.
Suite 102

Fort Lauderdale, FL 33309



Referrals! Referrals! Referrals!

We love referrals!! Please tell your family, friends, or neighbor that Walter Priebe will buy them lunch for an opportunity to introduce himself and offer his services and expertise. Two dates are being offered this month. We invite you and a friend or neighbor to come on by for a quick introduction, order lunch to go and

allow him the opportunity for a no-cost, no-obligation first appointment at a later date at your convenience. Please call to book your next lunch with Walt!

Thursday, August 13th
Shooter's
3033 NE 32nd Avenue
Fort Lauderdale, FL
12pm-2pm LUNCH

Thursday, August 27th
Texas Road House
3001 Old Boynton Road
Boynton Beach, FL
4pm-6pm DINNER

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Tips for Talking to Your Elderly Parents About Money:

Now that you have a better understanding of the reasons why your elderly loved one avoids talking about their finances, it's time to work on a strategy so you can have the meaningful, respectful, drama-free conversations you need to have. Here are a few suggestions to help get you started:

- Find the right time
- Explain why you're having this conversation
- Limit the information you need to gather
- Normalize the process
- Share how difficult these conversations are for you, too
- Acknowledge that financial planning can be confusing
- Identify where your elderly parent can maintain control
- Don't go it alone

You do not want to be perceived as someone who wants to come in and take over. Instead, be sure to let them know that you are proud of what they have created and that you truly appreciate the opportunity to work with them to create a more secure financial future.

A Blood Test to Detect Alzheimer's Disease Moves Closer to Reality

Researchers believe game-changing test will be available to doctors in 2 years

<https://www.aarp.org/health/brain-health/info-2020/blood-test-alzheimers.html?intcmp=AE-HP-LL1>



Tune in to Walt of Priebe Investment Plans from 10am-10:30am every Wednesday on 1470AM, 95.3FM and 103.9FM dials and 8am-10am every Sunday on your 1230AM dial.

DID YOU KNOW??

You can avoid lines, crowds and impulsive shopping by doing your weekly shopping through



INSTACART? Download the app on your smartphone and get your groceries delivered on the same day.

BE PREPARED FOR 2020 HURRICANE SEASON



www.floridadisaster.org/planprepare/



CLIENT CELEBRATIONS

Client Birthdays

Jeane Baker
James Christie
Jorge Chavez
Bob DiStefano
George Eaglin
Donna Mae Flynn
Irene Jacobs
Bryna Jagoda
Bob Klemm
Linda Leonard
John Leonard
Rick McDonough
Diane Margolin
Mark Manceri
Mark Paterson
Elaine Renshaw
Sonia Rodriguez
Lizzy Ryan
Darma Sainmervil
Becky Schmaus
Yvonne Shahoud
Terry Turner
Paul Thomas
Joan Woodson
Tom Zace



Guess who is celebrating a special birthday

Walter Priebe turns 60!!

Wedding Anniversaries

Dan & Julie August
David & Rita Barnes
Rob & Adriana Christie
Jerry & Gloria Dick
Les & Kay Dodd
Ray & Jennifer Schlichte
Bob & Geraldine Wright



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Rosie's

RECIPE CORNER



Italian Chicken Wraps

- 1 extra large tortilla wrap, flatbread or lavash bread
- 2 tbsp. roasted pepper bruschetta spread
- 5-6 slices cooked chicken breast
- Handful of arugula or spinach
- 2 slices of provolone
- 3-4 thin slices of tomato
- 2 tbsp. artichoke bruschetta spread
- 10 slices Kalamata or black olives
- Sliced red onion
- Drizzle of balsamic

Lay the tortilla on a flat surface. Starting on the edge closest to you, layer a stripe of red pepper bruschetta. Place the chicken slightly overlapping the bruschetta, then add a strip of arugula, the provolone cheese and the tomato. Top with the artichoke bruschetta then the olives and sliced red onion and drizzle lightly with the balsamic.

Make sure you visit our website www.priebeinvestmentplans.com for interesting articles or to view your direct business accounts. If you do not have access or have not registered for online access, please contact our office.

