

10k boomers

is the amount of retirement savings for 41% of people aged 55-64

Get started »

# Title Describing the Problem

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Get started »

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# Who We Are

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Learn more about us

# Title Describing the Solution



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Link here to learn more



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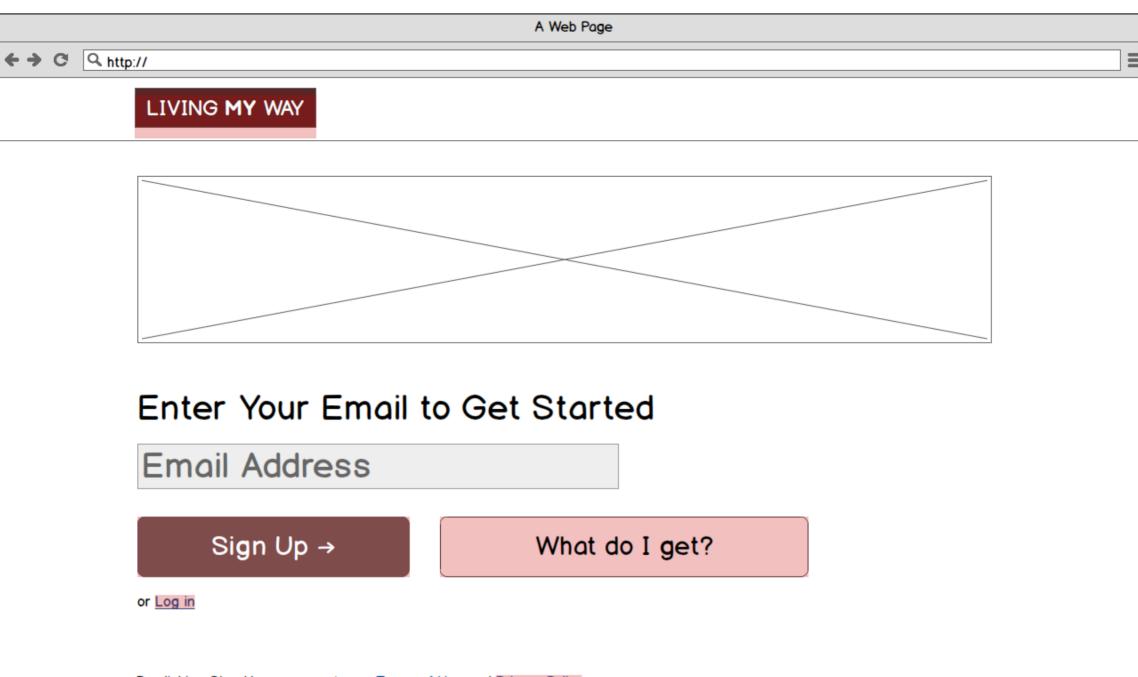












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# Welcome back <u>John</u> at <u>jonathanalexanderdoe@gmail.com</u>. It's great to see you again.

You currently have an account with us through Living My Way or NCOA.org.

# Would you like to link your account with Living My Way?

Yes I'd like to use my existing account and password  $\rightarrow$ 

No thanks, I'd like to create a new account →

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# What do I get when signing up for a Living My Way Account?

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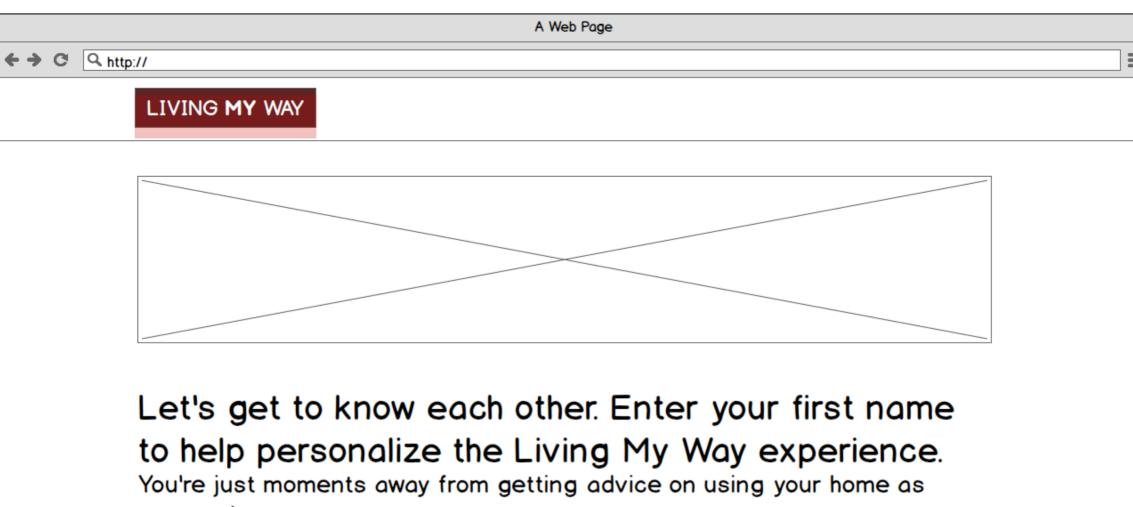












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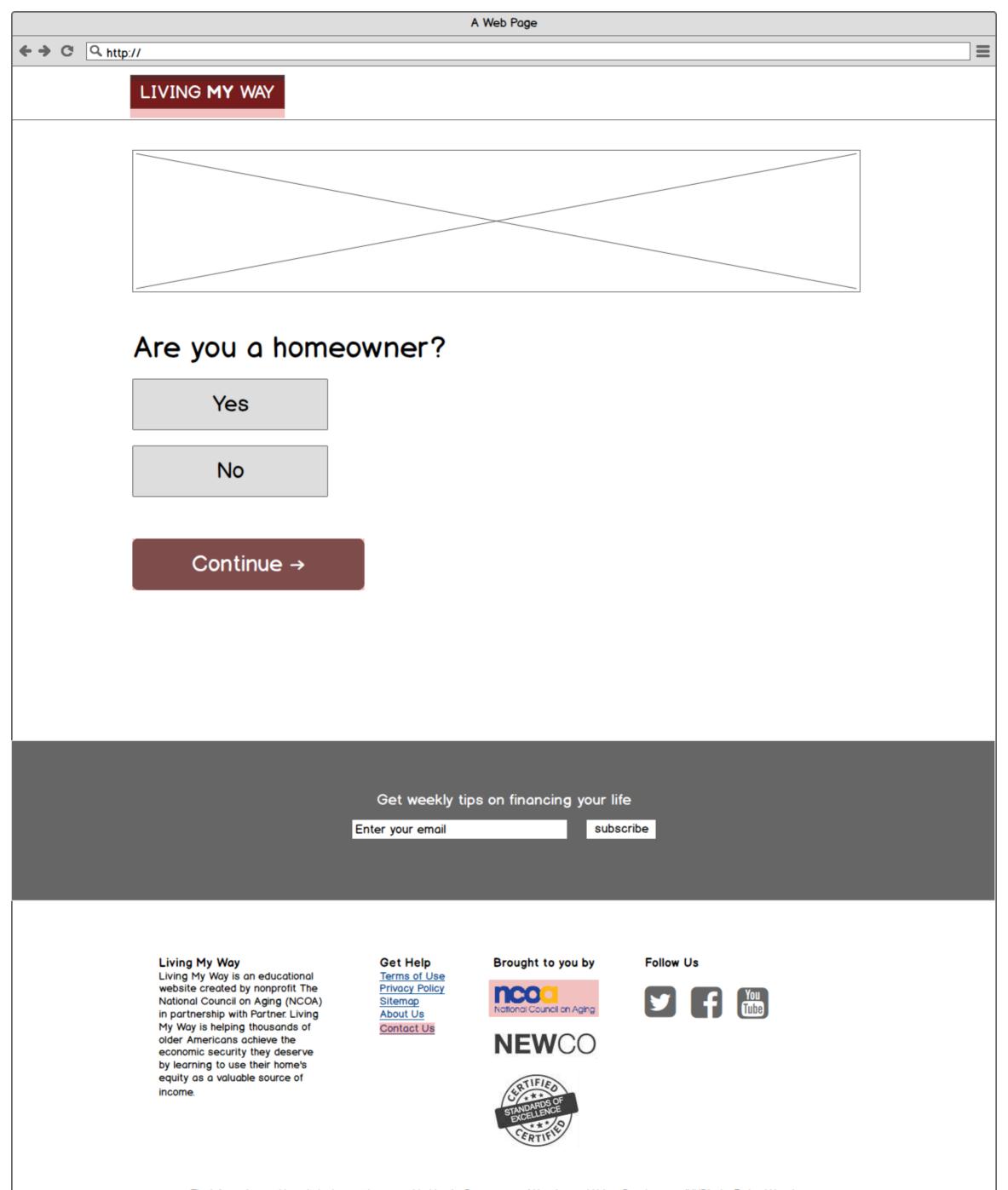












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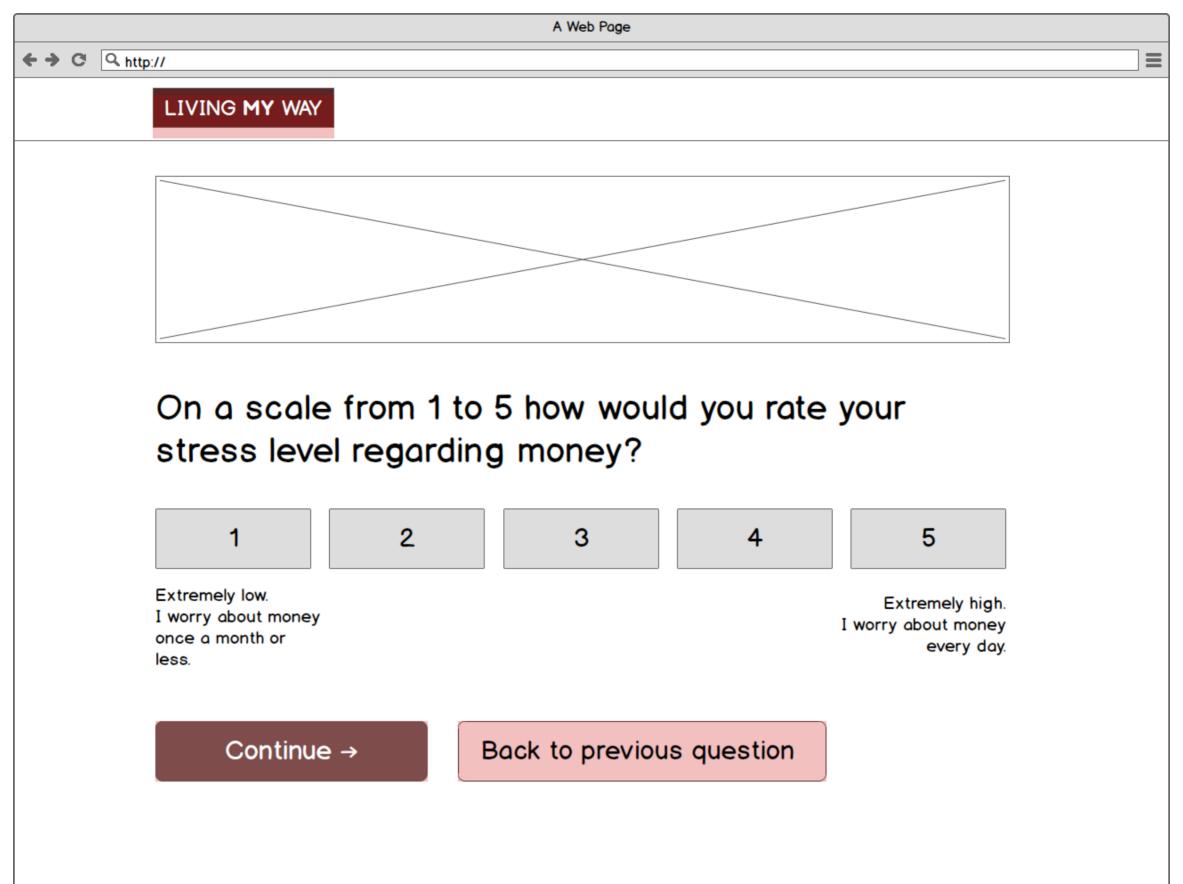












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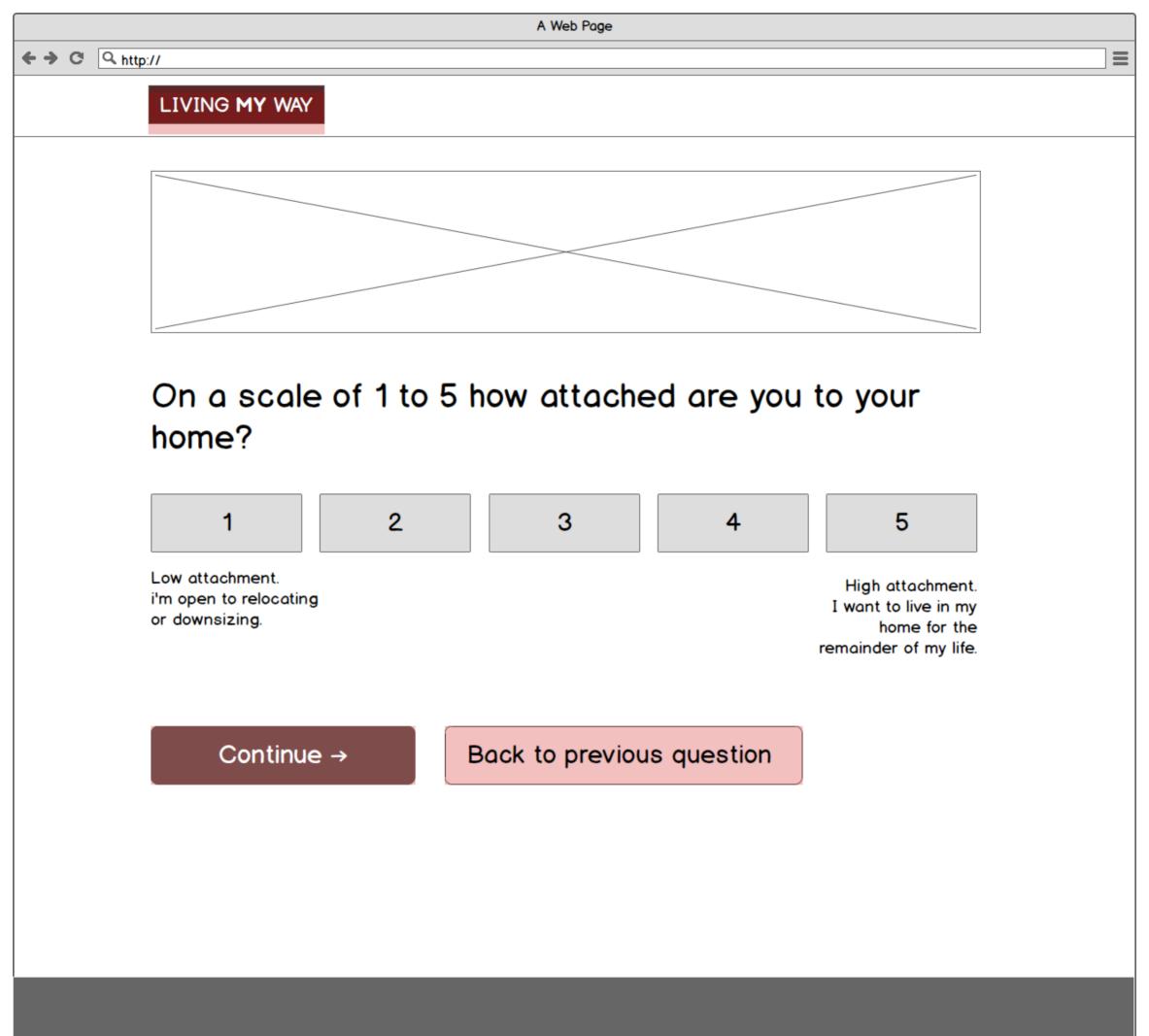












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Dashboard > Aging in Place

# Aging in Place

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**Priority** 



Aging in Place



**Increasing Cash Flow** 

Relocation

9 Recommendations

Quiz

How much have you learned about your aging in place options?

Take this brief quiz and test your newfound knowledge!

Start the Quiz »

Assessment

# Which home-based > strategy is right for me?

Answer a few quick questions about your current situation, and get personalized recommendations for your next steps.

Take the Assessment »

Calculator

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Try the Calculator »

FAQ

What are all of the > home equity financial products available to me?

Get an overview of the pros and cons of your various options.

Video

# How are we defining "home"?

Do manufactured homes, trailers, and condos all count? What requirements make someone a home owner? How much equity do vou need?

Blog

# What are the quality-of-life implications of staying in my home?

Check out this 7 step guide to making sure your home is safe and aging-friendly.

Blog

# 3 Ways to avoid common homerelated scams

Check out this guide to common home improvement and renovationrelated scams to look out for.

Video

# Myths and Misconceptions: What exactly is a reverse mortgage?

You've probably heard a lot about reverse mortgages—but what info can you trust? Check out these 10 fast facts on reverse mortgages.

Blog

# What happens if I can no longer stay in my home as planned?

An overview of different scenarios that may complicate your plan to stay in your home.

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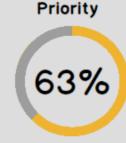




Dashboard > Safely Increasing Cash Flow

# Safely Increasing Cash Flow

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Aging in Place

Increasing Cash Flow



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Quiz

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FAQ

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Video

How are we defining "home"?

Do manufactured homes, trailers, and condos all count? What requirements make someone a home owner? How much equity do vou need?

FAQ

What factors determine whether I am a good fit for a home equity loan?

How do credit score, tax paying history, property insurance and other factors play into your suitability for a loan?

Blog

What are typical longterm costs associated with retirement?

An in-depth guide to typical longterm retirement costs, as well as the importance of anticipating unforeseen healthcare issues.

Blog

How can I maintain > or increase my income as a current retiree?

An overview of all available cash flow-increasing options, including home equity loan types as well as other strategies.

Blog

I want to retire in a financially healthy way. How can I plan for that now?

An overview of different strategies for preparing yourself and your home for retirement.

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Dashboard > Relocation

# Relocation

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**Priority** 



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Increasing Cash Flow

9 Recommendations

Quiz

How much have you learned about your relocation options?

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Assessment

Which home-based > strategy is right for me?

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FAQ

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Get an overview of the pros and cons of your various options.

Blog

What are the quality-of-life implications of leaving my home?

Learn more about nursing homes, retirement communities, assisted living, and other relocation options and how they might affect you.

Infographic

What are typical costs associated with different relocation options?

Learn more about the costs of all the relocation options.

Blog

If I decide to leave my home, what are my options?

Learn more about nursing homes, retirement communities, assisted living, downsizing, and other relocation options.

Glossary

What is an assisted living community?

Learn more about common home and lifestyle related terminology.

Video

How are we defining "home"?

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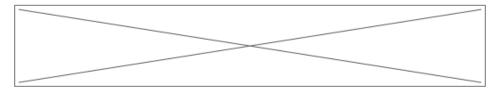




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# Welcome to Living My Way



Intro about Living My Way. Text says what you'll get and what you can expect, ask them to confirm their email, and encourage them to complete registration. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis tincidunt tincidunt magna ut feugiat.

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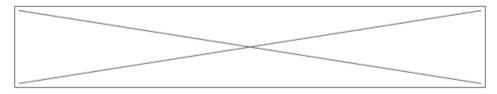
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### LIVING MY WAY

# You're Doing Great!



Intro paragraph congratulating them on what they've completed so far (persona tool), and gummy vitamin language about them being on the positive path to using their home as an asset. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis tincidunt tincidunt magna ut.

### Your Next Steps at Living My Way

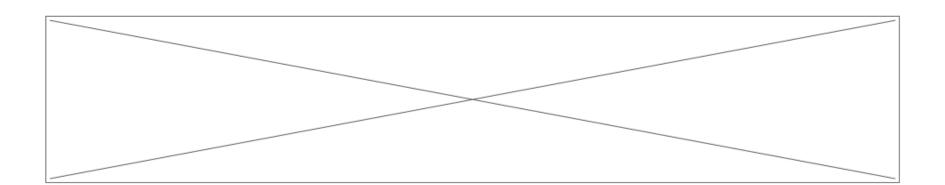
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- Test your knowledge with one of the three Financial Literacy Quizzes ipsum dolor sit amet, consectetur adipiscing elit.





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LIVING MY WAY



# Thank you for confirming your email address

Please create a strong password so you can access Living My Way at any time.

# **Password**

Strong passwords are extremely important to prevent unauthorized access to your account

# Password Requirements:

- Your password must contain at least 8 characters
- Your password must contain at least 1 lowercase letter
- Your password must contain at least 1 uppercase letter
- Your password must contain at least 1 number or symbol
- Your password cannot contain your first name

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Hi, First Name ▼



# Your Progress

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# Certificate Completeness

1/8

✓ Personal Tool Assessment

☐ Financial Snapshot Take it now!

☐ Read at least 3 blog articles

☐ XYX Quiz Take it now!

☐ XYZ Assessment Take it now!

☐ Aging in Place Literacy Quiz <u>Take it now!</u>

☐ Relocation Literacy Quiz <u>Take it now!</u>

☐ Safely Increasing Cash Flow Literacy Quiz <u>Take it now!</u>

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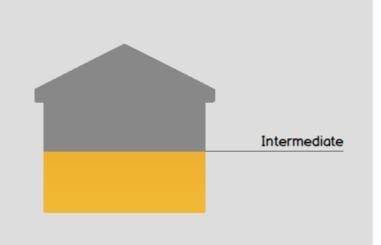


Hi, First Name ▼

> Your Progress

# Your Progress

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# Certificate Completeness

3/8

✓ Personal Tool Assessment Retake

✓ Financial Snapshot

☑ Read at least 3 blog articles

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☐ XYZ Assessment Take it now!

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> Your Progress

# Your Progress

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# Certificate Completeness

6/8

✓ Personal Tool Assessment Retake

✓ Financial Snapshot

☑ Read at least 3 blog articles

☐ XYX Quiz Take it now!

✓ XYZ Assessment Retake

☑ Aging in Place Literacy Quiz Retake

✓ Relocation Literacy Quiz

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# Certificate Completeness

8/8

✓ Personal Tool Assessment Retake

✓ Financial Snapshot

☑ Read at least 3 blog articles

✓ XYX Quiz Retake

✓ XYZ Assessment Retake

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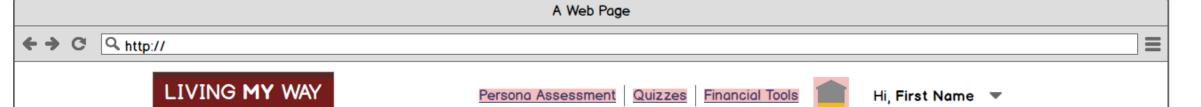












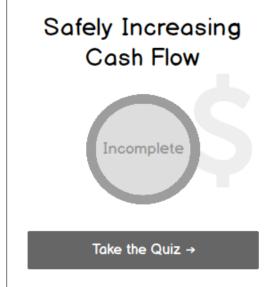
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# Your High Scores







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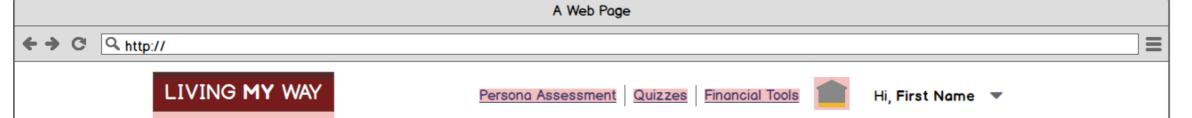
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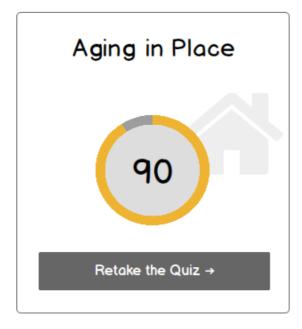


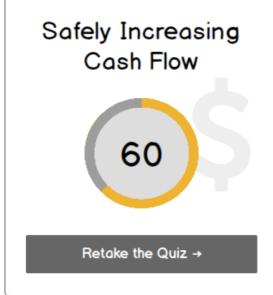
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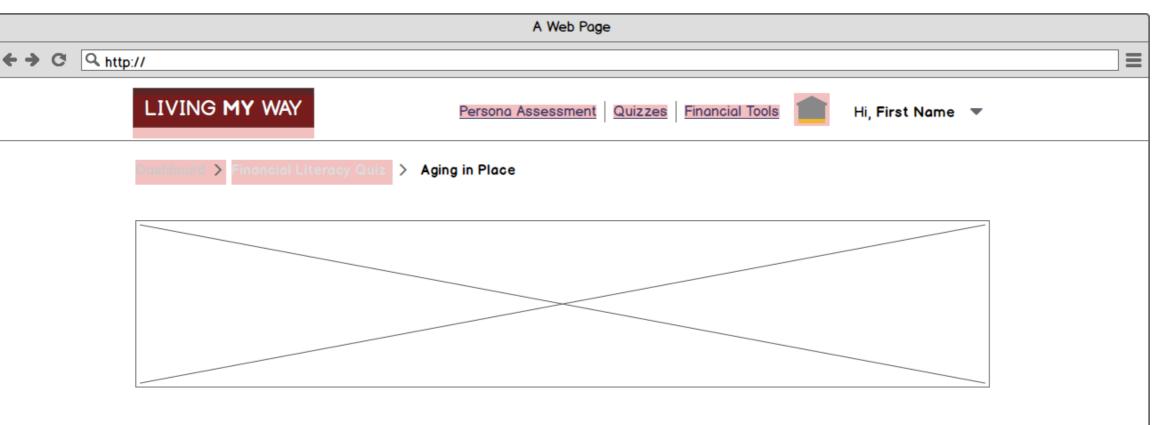












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True

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# Results

- Q: True or False. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- 🗸 A: True. Suspendisse laoreet elit vitae eros varius, a dapibus ipsum ultrices. Nunc posuere egestas libero, a tristique nunc viverra nec. Etiam ut felis tortor. Learn more.

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- Q: Lorem ipsum dolor sit amet, consectetur adipiscing elit.
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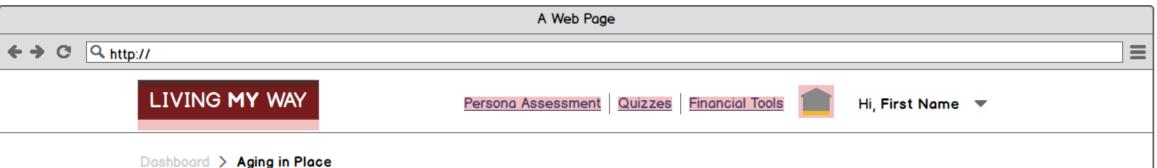


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Dashboard > Aging in Place



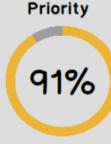
On June 2nd at 1am EST, Living My Way will be performing infrastructure upgrades. We anticipate this outage will take between 2 and 4 hours to perform. During this time, the site will be inaccessible. We are sorry for any inconvenience.



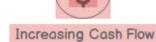
Downtime message would appear on the Dashboard homepage before main content and user should be able to close out the message if they don't want to see it.

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Quiz

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Take this brief quiz and test your newfound knowledge!

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Assessment

Which home-based > strategy is right for me?

Answer a few quick questions about your current situation, and get personalized recommendations for your next steps.

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Calculator

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FAQ

What are all of the > home equity financial products available to me?

Get an overview of the pros and cons of your various options.

Video

How are we defining "home"?

Do manufactured homes, trailers, and condos all count? What requirements make someone a home owner? How much equity do Blog

What are the quality-of-life implications of staying in my home?

Check out this 7 step guide to making sure your home is safe and aging-friendly.

Blog

3 Ways to avoid common homerelated scams

Check out this guide to common home improvement and renovationrelated scams to look out for.

Video

Myths and Misconceptions: What exactly is a reverse mortgage?

You've probably heard a lot about reverse mortgages—but what info can you trust? Check out these 10 fast facts on reverse mortgages.

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What happens if I can no longer stay in my home as planned?

An overview of different scenarios that may complicate your plan to stay in your home.

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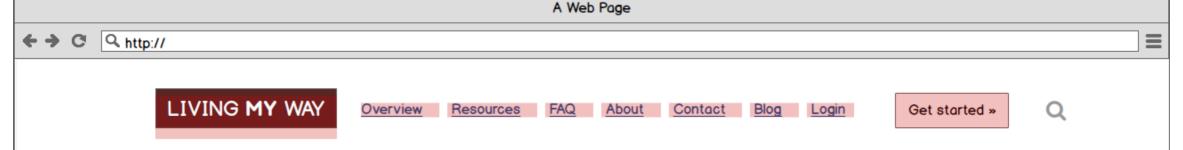
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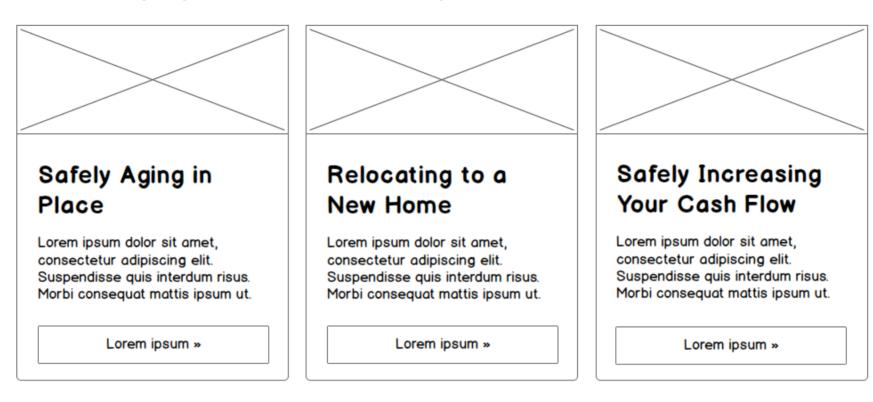






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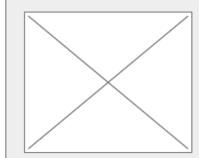


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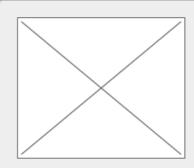
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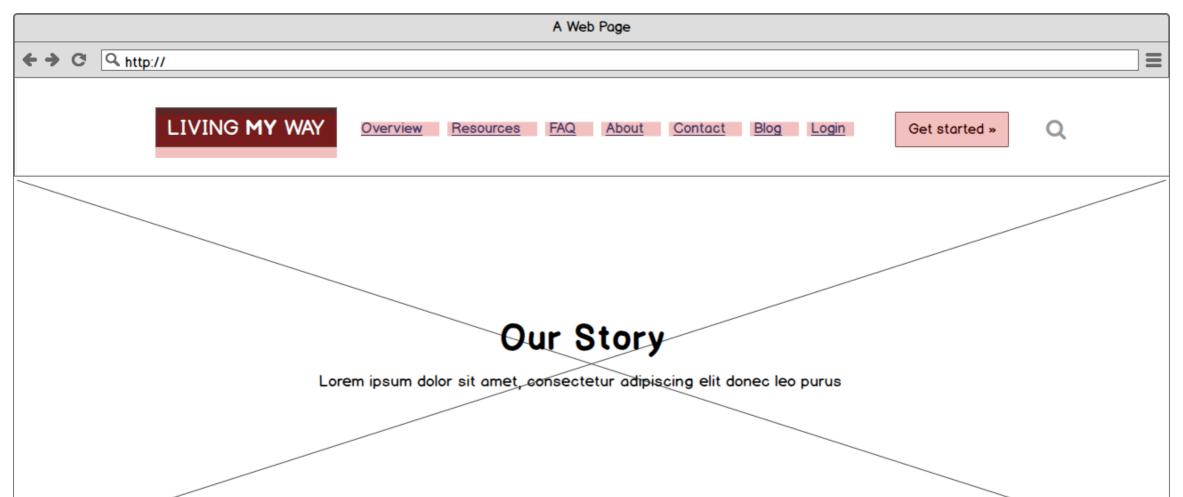






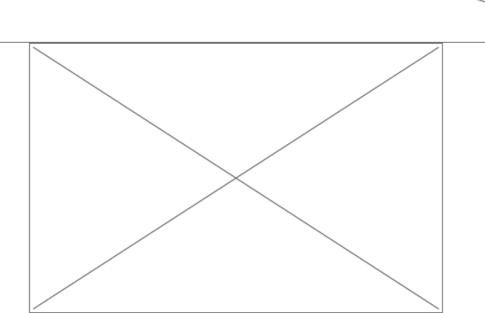






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# **Executive Team**

<u>Firstname Lastname</u> Role

Firstname Lastname Role

Firstname Lastname

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# **Board of Directors**

Firstname Lastname Role, Organization

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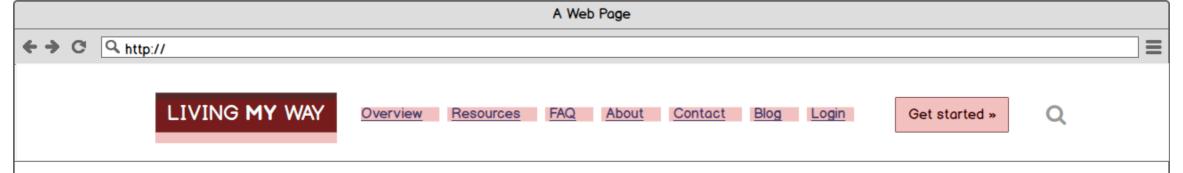
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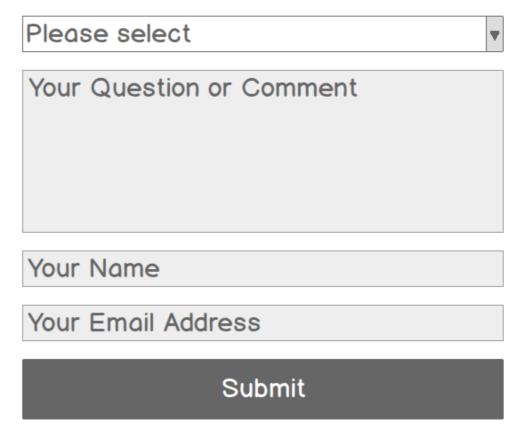


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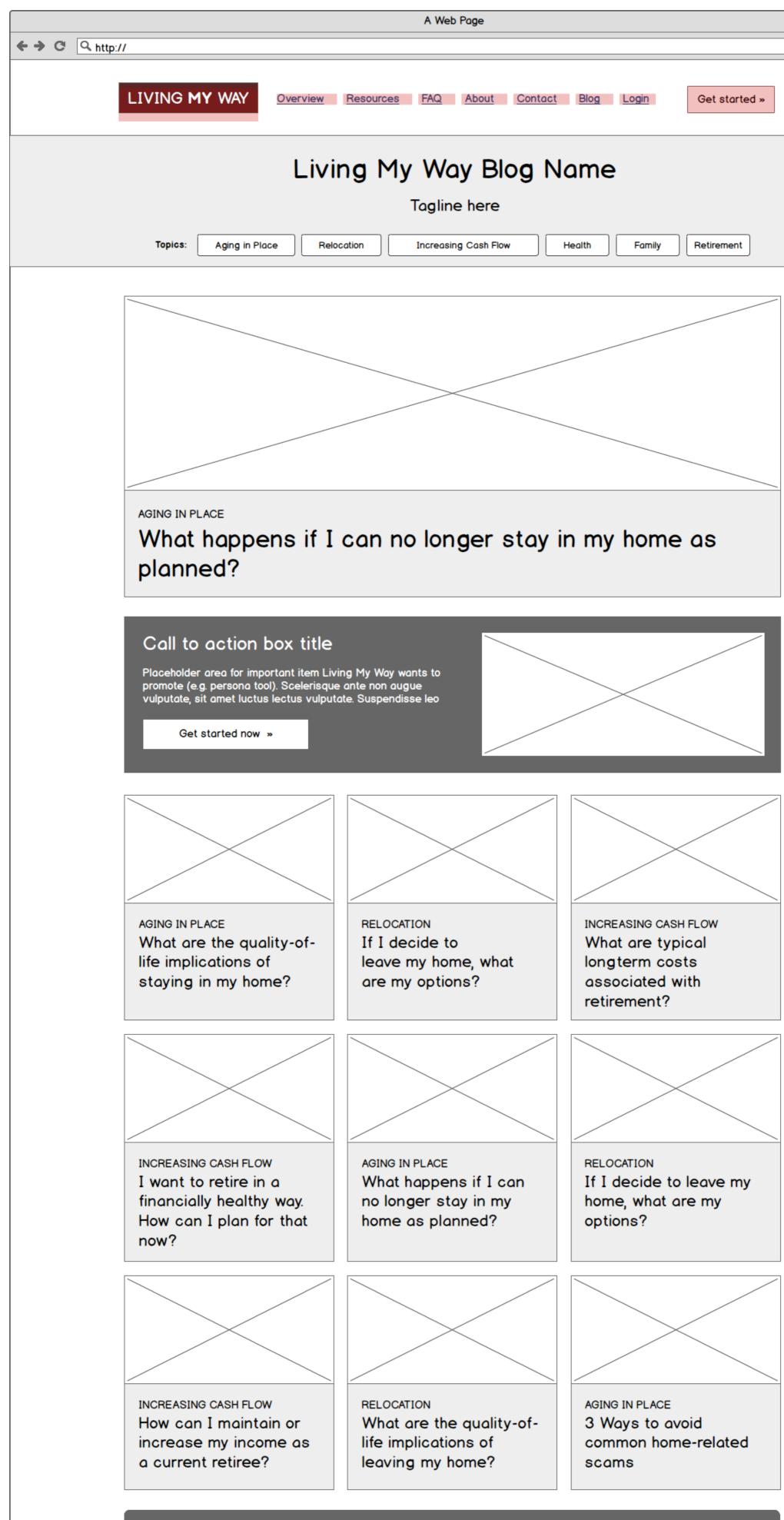


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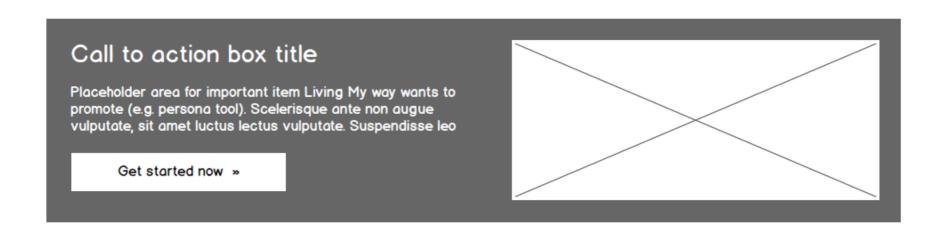
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> Financial Snapshot > Results



# Thank You For Completing Your Financial Snapshot

Based on your answers, aging in place is a good fit for your situation and you have some options with your home. Below are some financial products typically suggested to people with qualities like yours.



### Financial Product 1

Phasellus semper metus vel faucibus auctor. Curabitur nec accumsan ligula. Integer interdum felis ac ligula pharetra consecte.

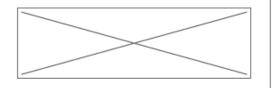
www.loremipsumdolor.com



### Financial Product 2

Phasellus semper metus vel faucibus auctor. Curabitur nec accumsan ligula. Integer interdum felis ac ligula pharetra consecte.

www.loremipsumdolor.com



### Financial Product 3

Phasellus semper metus vel faucibus auctor. Curabitur nec accumsan ligula. Integer interdum felis ac ligula pharetra consecte.

www.loremipsumdolor.com

### Additional Resources



### Resource 1

Phasellus semper metus vel faucibus auctor. Curabitur nec accumsan ligula. Integer interdum felis ac ligula pharetra consecte.

www.loremipsumdolor.com



### Resource 2

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### Living My Way

Living My Way is an educational website created by nonprofit The National Council on Aging (NCOA) in partnership with Partner. Living My Way is helping thousands of older Americans achieve the economic security they deserve by learning to use their home's equity as a valuable source of income.

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Hi, First Name -



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# Thank You For Completing Your Financial Snapshot

Based on your answers, aging in place is in alignment with your future goals, but it might not be possible with your current financial situation. Below are some resources to help you get financial assistance.



### Resource 1

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### Resource 2

Phasellus semper metus vel faucibus auctor. Curabitur nec accumsan ligula. Integer interdum felis ac ligula pharetra consecte.

www.benefitscheckup.org



### Resource 3

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www.loremipsumdolor.com



### Resource 4

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www.loremipsumdolor.com



### Resource 5

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# Thank You For Completing Your Financial Snapshot

Based on your answers, relocation appears to be a better fit for you and your goals instead of aging in place.



### Learn More About Relocation

Unfortunately relocation might not be possible due to your current financial situation. Below are some resources to help you get financial assistance.



### Resource 1

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www.loremipsumdolor.com



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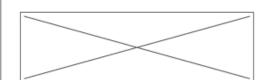


Based on your answers, relocation appears to be a better fit for you and your goals instead of aging in place.

Thank You For Completing Your Financial Snapshot



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Dashboard > Relocation

# Relocation

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**Priority** 91%

## You're a Better Fit for Relocation

You initially showed a strong interest in aging in place but your Financial Snapshot indicates relocation is best for your situation. Your dashboard has been updated to reflect this. Donec at velit id nisi. Gravida vestibulum quis blandit dolor. Fusce non consectetur



Quiz

How much have you learned about

your relocation options?

newfound knowledge!

Take this brief quiz and test your

Assessment

Which home-based strategy is right for me?

Answer a few quick questions about your current situation, and get personalized recommendations for your next steps.

Calculator

Morbi dapibus dui justo ac varius nunc efficitur et

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Maecenas nec massa

FAQ

What are all of the home equity financial products available to me?

Get an overview of the pros and cons of your various options.

Blog

What are the quality-of-life implications of leaving my home?

Learn more about nursing homes, retirement communities, assisted living, and other relocation options and how they might affect you.

Infographic

What are typical costs associated with different relocation options?

Learn more about the costs of all the relocation options.

Blog

If I decide to leave my home, what are my options?

Learn more about nursing homes, retirement communities, assisted living, downsizing, and other relocation options.

Glossary

What is an assisted living community?

Learn more about common home and lifestyle related terminology.

Video

How are we defining "home"?

Do manufactured homes, trailers, and condos all count? What requirements make someone a home owner? How much equity do you need?

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