When MIT Comes Knocking

Family-focused Financial Planner Tapped to Help Develop New MIT AgeLab Curriculum

MIT AgeLab consultant and financial planner Forrest Williams with research panel member Dianne Ferebee.

VIRGINIA BEACH, VA, UNITED STATES, July 12, 2022 /EINPresswire.com/ -- MIT's AgeLab was on a mission. Partnering with the government, businesses and NGOs to discover ways to improve the quality of life for older adults and their caregivers, they needed input from an expert in the financial planning field who had success in coaching older clients through financial strategies needed to accommodate caregiving costs and logistics. One of their over 1500 global research panel members, Dianne Ferebee, was adamant in her recommendation of the ideal candidate.

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>
> *Forrest Williams*

Ferebee, whose husband had early onset dementia but was otherwise physically fit, had been in a quandary. Her family wanted the couple to join in a once-in-a-lifetime family trip to France. Concerned it wasn't a prudent financial investment, she turned to her longtime financial advisor, Forrest Williams of the Opus Group of Virginia (OpusVa.com), for advice. "Can we afford it?" she asked, fully expecting he wouldn't endorse such extravagance so late in their lives. Surprisingly, his response was, "You can't afford not to do this." He assured her that their resources could well handle this singular investment in what may very well be the last significant opportunity the family would have to build memories with her husband. His advice exceeded recommending the simple practicality of financial frugality to embrace the emotional significance and impact the investment in such a trip would return. His advice spoke to maximizing the couple's overall wellbeing, not just the value of their investment portfolio. This was the thoughtful and caring expertise MIT was seeking. In November of 2021 Forrest Williams received a call.

Forrest Williams' insights were needed as part of MIT AgeLab's PLAN (Preparing for Longevity Advisory Network) initiative, in partnership with TransAmerica, to help families begin to have conversations about changing care needs as they age.

In June of 2022, after months of consulting with MIT, Williams was included in the MIT AgeLab PLAN Webinar: Advising Across Generations | Forging Family Conversations about Wealth, Care, and Longevity, where he shared insights with 60 other financial planning professionals located across the country on strategies to help families discuss and navigate the uncertain times aging can bring. He also contributed to the development and wrote the foreword for the MIT AgeLab's Financial Professional's Guide entitled Caregiving and the Future of Financial Advice.

"When MIT came knocking, I couldn't say no," related Williams. "As much as the financial planning business is about maximizing returns on financial investments, for me, it's so much more than that. My focus, no—my mission, is to help my clients maximize all their life investments, personal and financial. I feel that is my role, like a sherpa guiding them through proven strategies and avoiding dangerous pitfalls to arrive what they would call success. My association with MIT AgeLab allows me to exponentially impact more people in that same way. I'm grateful to be a part of the project."

ABOUT THE OPUS GROUP OF VIRGINIA
The Opus Group of Virginia is an independent wealth management firm working with businesses, families, and individuals. We understand that you have worked hard to get to where you are and want to protect and nurture what you have built. That means taking care of your bottom line. That means taking care of your people and your family. You can do it all. And our professionals can help. Block by block, step by step, we help build value for your business, your people, your family, and your future. More about Forrest Williams and The Opus Group of Virginia can be found at OpusVA.com.

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