



## Book Sheri Samotin to speak at Your Conference or Meeting

on

### Life Transition Planning & the Other Mid-Life Crisis Adult Children Caring for Aging Parents

#### *Why is it a crisis?*

- The number of adult children assisting an aging parent has more than tripled in the past fifteen years
- More than one-half of older adults resist asking for help
- More than 70% of those over 65 will need assistance

#### **Sheri L. Samotin**

*Licensed Professional Fiduciary  
Professional Daily Money  
Manager National Certified  
Guardian*

*Private corporations often hire Sheri to speak as a reward for their top clients or top producers who are facing these issues in their personal lives and to assist them in formulating their employee assistance policies.*

***Sheri will customize a program for your organization and audience.***

#### **See and hear Sheri in action:**

- Interview by **Jack Canfield**, co-author of the bestselling *Chicken Soup for the Soul* series
- Presenting at conferences

[www.LifeBridgeSolutions.com/speaking](http://www.LifeBridgeSolutions.com/speaking)

*Sheri Samotin, President of LifeBridge Solutions and author of **Facing the Finish: A Road Map for Aging Parents and Adult Children**, is a frequent speaker at conferences and corporate events. Audiences include senior service professionals, trusted advisors, adult children, aging parents, and caregivers on a variety of topics related to life transition planning, caregiving, daily money management and fiduciary services.*

#### REPRESENTATIVE PRESENTATION TOPICS

1. What to Know Before You Say "I will": Your Role as a Family Fiduciary
2. Tales from the Trenches: How Advance Health Care Directives Work in the Real World
3. The Five Most Common Sources of Angst When Caring for Aging Parents
4. Teach Your Wife to be a Widow
5. You're Not 12 and 14 Anymore: Sibling Challenges When Caring for Aging Parents
6. I'm Not Ready Yet: Why it is So Hard for Older Adults to Give Up Their Home
7. The Best Gift You Can Give Your Family: Plan for Your Old Age
8. Running an Effective Family Meeting
9. Facing the Finish: Helping Aging Parents Deal with Adult Children
10. Making the Most of a Holiday Visit with Your Aging Parents
11. Seven Signs an Aging Parent Needs More Help
12. Taking Charge Without Taking Over When Caring for Aging Parents
13. Lifesavers for Long Distance Caregivers
14. Whose Life is it Anyway? How to Select and Work with a Fiduciary
15. How to Detect When Finances May Be Off Track

To contact Sheri L. Samotin:

323-452-2680

Based in Los Angeles. Nationwide, phone or Skype by arrangement

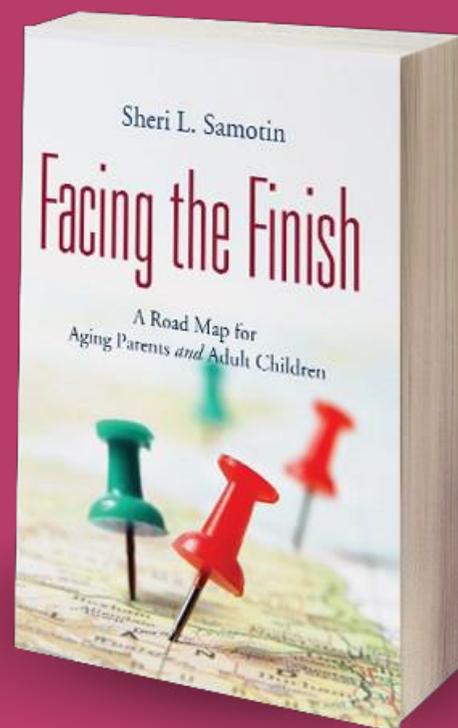
[Sheri@LifeBridgeSolutions.com](mailto:Sheri@LifeBridgeSolutions.com)

[www.LifeBridgeSolutions.com](http://www.LifeBridgeSolutions.com)



## REQUIRED READING:

As part of her seminars and talks, Sheri often makes her book available. Written both for older adults and the adult children who will care for them, it is loaded with tips and tricks for creating a dialogue between the two generations and handling the many decisions and details that can become overwhelming. The book covers everything from emotional considerations to practical matters about money, housing concerns, and health care. Case studies illustrate each point and advice is offered on when it's best to seek professional help. A **companion workbook** is also available. Visit [www.FacingTheFinish.com](http://www.FacingTheFinish.com).



### SELECTED TESTIMONIALS

*“The feedback on the events has been tremendous! I want to thank you, as well, for accommodating our schedule of events and for sharing your passion for this area with our clients and our advisors.” — James Cadet, UBS Wealth Management (Albany, NY)*

*“Author Sheri Samotin renews our capacity to fulfill the teaching “honor your mother and father.” In this world of longer life expectancy, that commandment has taken on new meaning, and responsibility for adults sandwiched between caring for their children and their parents at the same time. Mixing useful insights gained from years spent in this field with pragmatic suggestions, Samotin provides starting points for all parties in the discussion. Having hosted a roundtable discussion with Ms. Samotin, I have seen first-hand her ability to talk individuals through these challenging life transitions. I highly recommend having her come to visit your community. Sheri Samotin is a skilled presenter, and can work in large group settings, or smaller discussions. A wonderful intergenerational program for baby-boomers, their parents, and their children.” — Rabbi Adam Miller, Temple Shalom (Naples, FL)*

*“Fantastic presentation.” “Very informative.” “Excellent, great topic.” — Comments from Certified Senior Advisor Conference attendees (Denver, CO)*

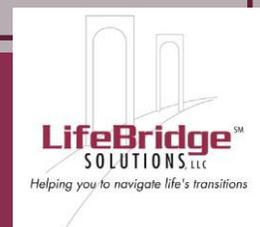
*“Sheri Samotin addresses a rather difficult topic using language that resonates with mature adults. Her advice is sound, relevant, practical, and actionable. She is a seasoned subject matter expert who genuinely cares about her clients and all people navigating this important yet challenging decision making process.” — Dr. Greg Smith, Naples United Church of Christ (Naples, FL)*

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**Sheri L. Samotin**  
**President**  
**LifeBridge Solutions, LLC**

*Sheri L. Samotin, President of LifeBridge Solutions, LLC. She is a Licensed Professional Fiduciary, a National Certified Guardian and a certified Professional Daily Money Manager. She founded LifeBridge Solutions after watching friends and family members struggle with the day to day business of life. Through a determined and steady progression and career path, Sheri has developed the skills and expertise that enable her to assist and guide her clients in a caring and knowledgeable manner.*

*Sheri has more than 35 years of business and management experience having served as a health care consultant, a medical Practice Administrator, and Chief Operating Officer of a national management consulting firm.*

*Sheri is a member of the Professional Fiduciary Association and the American Association of Daily Money Managers where she serves on the board. Sheri is also an affiliate member of the Beverly Hills and Los Angeles County Bar Associations. Sheri serves on the board of OPICA, an adult day and counseling center for people suffering from memory loss and their families.*

*Sheri holds a BA in Economics from Wesleyan University and an MBA from the Amos Tuck School of Business at Dartmouth College.*

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*Presenting at conferences*

*Interviewed on TV & radio*

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**Selected recent speaking engagements include:**

*St. John of God Annual Luncheon  
USC Trust and Estate Conference  
National Academy of Elder Law Attorneys  
American Association of Daily Money Managers Annual Conferences  
Certified Senior Advisors National Conference  
Aging Life Care Professionals Conference  
Florida State Guardianship Association conference  
Professional Patient Advocates conference  
Memorial Sloan Kettering Cancer Center  
Toyota Motor Corporation  
Belmont Village Westwood  
PALO Capital  
UBS Wealth Management  
Wheaton Wealth Management*

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