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Surviving the Costs of Alzheimer's Disease: Hillis Financial Services Hosts Educational Seminar

Advisors assist San Jose residents in financially and emotionally preparing for the impacts of Alzheimer's Disease

San Jose, Calif. — February 3, 2015 — Hillis Financial Services, a San Jose-based independent wealth management firm, in partnership with American Beacon Advisors, recently hosted a well-attended seminar discussing the financial impacts of Alzheimer's disease at the Golf Club at Boulder Ridge in San Jose on January 21, for clients and guests. The seminar, "Surviving the Costs of Alzheimer's Disease," featured speaker Jack Broyles, Chairman Emeritus Dallas Chapter of Alzheimer's Association. The firm held the seminar in lieu of their annual Economic Outlook event, which they've been hosting for more than a decade.

Mr. Broyles has been in the financial services industry for more than 30 years and has made eradicating Alzheimer's a part of his life's work since the disease took his mother in 2004. Mr. Broyles's mission is to educate advisors and their clients so they can be better prepared financially when a family member has been diagnosed. Mr. Broyles discussed with the seminar's 80 attendees the costs of Alzheimer's disease, planning for the disease and resources that are available to patients, caregivers and their families.

Dr. Gary Steinke, the co-founder of the Alzheimer's Activity Center in San Jose was in attendance along with Marilou Cristina, Interim Executive Director of the center.

"Anyone that has heard Jack speak has been emotionally moved by his story and the toll that Alzheimer's can take on a family," said Hillis Financial Services President Jack Hillis. "We wanted to ensure that our clients were financially, and even emotionally, prepared for the potential impacts of this terrible disease."

Hillis Financial Services has been a trusted San Jose wealth management firm since 2001. Mr. Hillis has more than 40 years of experience providing financial planning and asset management advice to individuals, corporate executives and business owners.

About Hillis Financial Services

Hillis Financial Services is an independent, personal wealth planning firm focused on managing the "irreplaceable assets" of its clients, families and individuals, many of whom are small business owners. The firm uses a conservative approach to its proactive client portfolio management, believing that managing downside risk can be more important in today's economy than seeking upside growth. As independent representatives of LPL Financial, the financial professionals at Hillis Financial Services, primarily provide unbiased fee-based advice and services including personal financial, retirement, education, tax and estate planning; long-term care, charitable giving as well as risk management. The financial professionals build customized asset allocation portfolios of stocks, bonds and alternative investments for their clients. The team has more than 70 years collective experience in managing portfolios, and many clients have been with the firm's advisors for more than 30 years. The firm is based in San Jose, California. For more information, please visit www.hillisfinancial.com. The financial professionals at Hillis Financial Management are registered representatives with and securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

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