

Bill Van Evera, CLU, ChFC – Special Care Planner – Albany, NY



Bill Van Evera has been involved in life care planning¹ for over 15 years and has been in the insurance industry even longer.

Bill's interest in life care planning started after his youngest son was born with Down syndrome. After attending a Down syndrome conference that offered a seminar on planning, Bill knew there had to be more people facing the same issues he and his wife were facing while planning for their family's future. So Bill began devoting time to life care planning for people in his community.

"MassMutual's SpecialCareSM Program is an important outreach initiative that provides access to information and financial services for individuals with special needs and their families. Because these individuals will need some type of assistance for their entire lives, this program helps their caregivers plan for this.

"As parents, we know we are not immortal, and someone else will have to take on the care of our children with special needs. I have over 50 clients who are caring for someone with special needs. In most cases, they have had little direction when it comes to planning for their loved one's future. I am glad to say that now they do."

Bill has become a resource for these families. In addition to financial planning, Bill has helped his clients find legal professionals, special needs services within the community, and even a summer camp for one of his clients' daughters.

"I like to think of my work as helping to create a road map for my clients. Helping families with special needs is my passion. And when I am told 'thank you,' I really have a sense of the good that I am doing. It is tremendously fulfilling to know that these families have taken steps to prepare for their loved ones' futures."

Bill has received the following designations: chartered life underwriter (CLU), chartered financial consultant (ChFC), and is certified in long term care (CLTC). He is a member of the National Association of Insurance & Financial Advisors and is also a member of the Society of Financial Service Professionals. Bill received his Special Care Planner certificate² from The American College in 2005, exclusive to MassMutual's SpecialCareSM Program.

William "Bill" Van Evera is a registered representative of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC, member [SIPC](#).
Supervisory Office: 8 Southwoods Boulevard, Albany, New York 12211, (518) 463-5533.

¹A life care plan is a coordinated program of future care planning, financial, and legal strategies for people with disabilities and their families. A life care plan continually changes throughout an individual's lifetime and is provided by a team that may include your legal and tax advisors as well as insurance and investment professionals.

²The Special Care Planner receives advanced training and information in estate and tax planning concepts, special needs trusts, government programs, and the emotional dynamics of working with people with disabilities and other special needs and their families. The certificate program is offered by The American College in Bryn Mawr, PA, exclusively for MassMutual Financial Professionals.