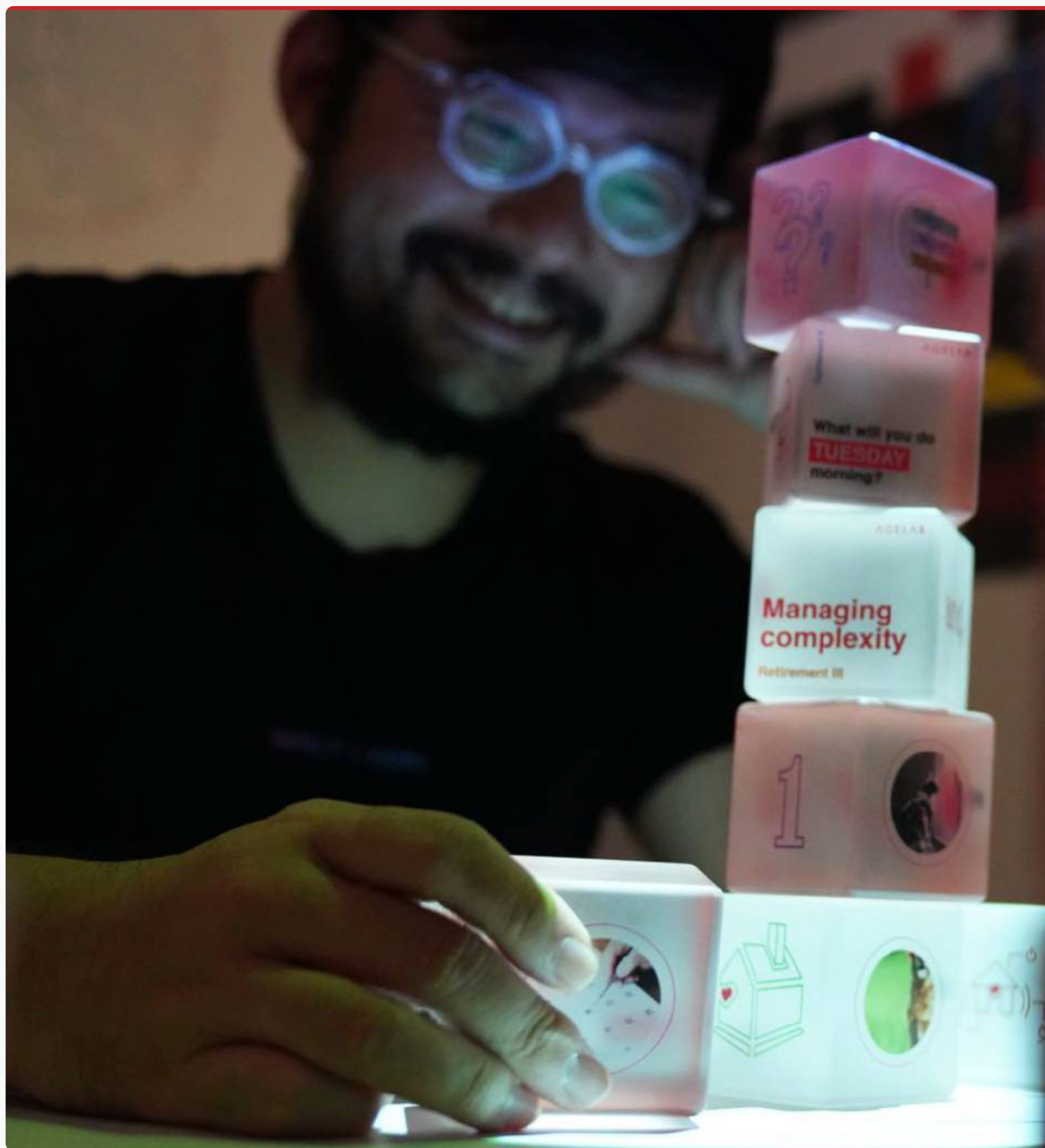


Sheng-Hung Lee Presents Longevity Planning Blocks for FPA 2023 Annual Conference

by [Adam Felts](#)



Sheng-Hung Lee, a doctoral candidate in service design and engineering at MIT who is conducting his PhD research with the AgeLab, presented in a breakout session at the [Financial Planning Association 2023 Annual Conference](#) on a tool he helped develop to aid financial advisors to have deeper conversations with their clients.

Longer lifespans demand new kinds of planning to ensure quality of life in older age. Financial advisors can play an important role in educating clients about the challenges and opportunities they might encounter in later life. But some advisors may not know how to initiate broader conversations about planning for longevity.

Mr. Lee and AgeLab Director Joseph Coughlin propose the use of “Longevity Planning Blocks” to help people project their future selves more tangibly. The twelve blocks are intended to be used in meetings between financial advisors and clients to spark conversations about imagining and planning for the future.

Scholars suggest that the use of artifacts may focus people’s attention and provoke learning, feelings, and discussions that people may not achieve with typical formal retirement conversations and checklists alone.

In the next step of research with Longevity Planning Blocks, Mr. Lee, Dr. Coughlin, and the AgeLab’s PLAN team are conducting an experimental Design for Longevity (D4L) service experience aiming to shift people’s perceptions from financial planning to longevity planning.

The partial presentation slides can be downloaded [here](#).

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About the Author



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Adam Felts is a researcher and writer at the MIT AgeLab. Currently he is involved in research on the experiences of family caregivers and the future of financial advice. He also manages the AgeLab blog and newsletter. He received his Master's in Fine Arts in Creative Writing from Boston University in 2014 and his Master's of Theological Studies from Boston University in 2019.

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