

- Assistance with filling out insurance and financial forms
- Future income needs discussion including loss of a spouse
- Family meeting to discuss objectives
- Developing a budget
- Home Assessment and recommendations for safety and aging in place
- Medical equipment evaluation and location
- Healthy eating & exercise evaluation and location
- VA overview and document collection for Veteran Aid and Attendance Program – NO HOURLY FEE

Facilitating - Easing the decision-making process & handling resources and providers - \$85 hour

- Assistance with interviewing vendors and providers
- Gathering and reviewing documents (trust, bank statements, annuities, pensions, 401Ks, life insurance, burial, and investment statements etc.)
- Calling companies to get policy/account values, to check on beneficiaries
- Reviewing original intent of life insurance policies and determining if money could be used for other higher-level purposes
- Review of health insurance and researching options
- Assistance with obtaining Social Security from a deceased spouse – dealing with Social Security issues
- Determining if long-term care insurance can be triggered, getting it triggered and assisting with choosing the best care provider
- Interviewing in-home care provider and coordinating services
- Setting up credit management services
- Researching mortgage options and assistance with application and negotiations
- Meeting with professionals to assist in the process (doctor's appointments, banking and finance appointments, applications for assistance, living arrangements and government programs)
- Moving logistics including dealing with medical providers, medical equipment companies and facilities
- Review of vendor proposals, insurance and financial illustrations and products, sales literature and real estate opportunities

Advocating - Taking up your cause - \$100 hour

- Overseeing the sale or purchase of a home/property
- Conference calls to insurance companies to advocate for benefits, assist with necessary documentation and talk to management to get information and approvals
- Overseeing the remodeling of homes for accessibility and aging in place
- Appealing health insurance claims
- Family negotiations and problem solving
- Longevity planning