



PLANNERS. FOR LIFE.



A PLAN IS ONLY AS GOOD AS ITS STAYING POWER.

For people with special needs, sustainability isn't a nice-to-have—it's a necessity. By collaborating with attorneys, financial planners, settlement consultants, corporate trustees, and insurance companies, we've made it our core focus to create comprehensive care plans that make quality of life not only possible, but sustainable over a lifetime.

What makes a plan that sticks?

**Three incredibly
important things:**

1: SMARTS

It's not just what we know. It's what we understand. We work with each client to understand their unique definition for quality of life, and then project the resources required to meet and sustain that standard.



We know the numbers.

As nurses, we're keenly aware of the health challenges faced by people with special needs. As partners to our clients, we have an even better understanding of their specific needs—and the associated costs. Using this knowledge, in combination with objective data, we create realistic projections of what it will cost to care for a client for a lifetime.

We add it together.

We analyze all financial sources available to the client: income, settlements, and government benefits. Years of navigating dense government systems has made us pros at identifying which benefits apply to our clients, and how much they'll cover. With a firm grasp on available resources, we're able to calculate how much more will be needed—a figure that's essential for sustained quality of life.

Many people with special needs report they've never defined their own standard for quality of life.

**THAT'S WHY IT'S
THE FIRST QUESTION
WE ASK.**

2: STRATEGY

Special needs care requires money. It's that simple. Knowing how and where it should be spent takes thoughtful analysis. That's where we come in.



We are a bridge.

Making connections is what we do. From a pie-in-the-sky dollar figure to a practical strategy for making it work. From big questions—like “how much is needed for big-ticket items, like vans and homes? how much is needed monthly? and what other resources are available?”—to clear reports detailing how funds should be configured to meet costs today, and in the future.

We make it count.

Whether we're outlining immediate and long-term costs, or determining what should be invested and what should be kept in cash, we are constantly working to stretch the client's dollar as far as it will go. Looking at all available resources at once, we devise a strategy for maximizing each one, so it offers the most benefit to the client for the longest period of time.

In the life of a special needs individual, a million dollars can last less than 10 years.

**SMART STRATEGY
HAS THE POWER TO
CHANGE THAT.**

3: SUPPORT

Beyond securing financial resources, planning for special needs care is about exactly that: care. It's about solving challenges—health challenges and life challenges—in a way that's right for the client.



We offer big-picture solutions.

We look at the client's and family's situation from a high-level perspective. Where are they now—emotionally, and in their physical living situation? What do they need to transition to what's next as smoothly and comfortably as possible? How will care be delivered on a day-to-day basis, and who will deliver it? We guide the client and family in finding answers that fit their lives.

We dig into the details.

Once we understand the client's and family's goals, we dive in and make sure providers and services are in place to meet them. Whether that means researching home modifications, interviewing care providers, or maximizing third-party payments, we support the client and family in achieving the day-to-day quality of life they envision.

WE ARE NATIONAL CARE ADVISORS.

We turn the overwhelming task of charting the course for the future into a clear, comprehensive plan—today. We do it through:

Special needs analysis and planning

- Projection of costs (all life stages)
- Analysis and configuration of government and third-party resources
- Litigation life care planning and mediation support

Benefits analysis and planning

- Medicaid and Medicaid Waiver analysis
- Social Security, Medicare, VA and Developmental Resource Assistance
- Medicare Set Aside and Lien analysis
- Medical bill review

Case management and advocacy

- Coordination of care, housing, transportation, vocation, and socialization
- Education advocacy
- Medical and vocational case management
- Workers' compensation and disability case management

Trust advisor services

Medicare Set Aside administration