GETTING STARTED WITH A

CARE CONCIERGE CONSULTATION

Expand Your Value Proposition with bQuest Care Concierge

Clients often turn to their advisors during life's most challenging moments including aging, care transitions, and end-of-life planning. With bQuest Care Concierge, you can meet these needs directly and strengthen your role as a trusted guide.

How It Works:

- The client completes a brief intake form and schedules a 60-minute consultation
- A Care Concierge professional provides personalized guidance and referrals to vetted providers
- You receive a summary of recommended next steps, helping you stay connected and engaged with your client's broader needs

Why It Matters:

- Deepens trust by supporting families beyond financial planning
- Helps clients proactively navigate aging care and avoid crisis-driven decisions
- Demonstrates your firm's commitment to holistic client well-being

How To Book

Option 1 Clients pay $350 per consultation, paid at the time of booking.

Option 2 The financial firm covers the service - at **no cost to the client.**

Pay & Book Appointment

Book Now - Firm Sponsored

Questions?

We invite you to contact us:
bQuest Care Concierge
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bQuest.