

INTRODUCING THE CARE COORDINATION PROGRAM

POWERED BY **bQuest**

Life transitions and Aging Care planning can feel overwhelming.
We're here to help.

As your trusted financial advisor, we understand that your needs extend beyond investment management. That's why we've partnered with bQuest to offer you exclusive access to comprehensive aging care resources and support.

Your New Benefits

Expert Resources

Comprehensive tools and educational content for aging care planning

Vetted Professionals

Access to our trusted national network of aging care specialists

Personal Care Coordination

One-on-one support to connect you with the right professionals for your situation

Key Areas Covered

- Aging-in-Place Planning • Cognitive Decline & Dementia Support
- Home Safety & Modifications • Mobility & Fall Prevention • Senior Living Communities
- End-of-Life Planning • Grief & Loss Support

Three Ways to Access Support

1. Get Started

Access your complimentary Care Coordination platform and explore trusted resources.

[ACTIVATE YOUR ACCOUNT](#)

2. Learn More

Get expert insights and practical tips on aging care, with resources delivered straight to your inbox.

[GAIN KNOWLEDGE](#)

3. Urgent Support

Get answers fast. A dedicated Care Concierge will connect you with vetted experts and personalized guidance.

[CONNECT WITH AN EXPERT](#)

*This personalized service is available for an additional fee.