STARTING THE AGING CARE CONVERSATION

If your client is planning for their *own* future

CARE COORDINATION

POWERED BY bQuest

Why It Matters

Clients want to know you understand their whole life plan — not just finances, but the people and care that support them as they age. Opening the door to these topics deepens trust, prepares families, and protects assets for generations.

How to Start: Simple Conversation Prompts

Soft Opener

"I know we have your financial plan in good order I'd like to make sure we've also talked about your wishes for care and support as you age. Is that something you'd be open to exploring together?"

Value Based

"Part of comprehensive financial planning is making sure you have trusted resources when life gets complicated. Can I share something new I'm offering?"

Family Lens

"Who's part of your support system today — and who would you rely on if your health or independence changed?"

Share a Story

"I've had other clients go through unexpected changes in health or care needs. Planning ahead made it much easier for them and their families. Have you given any thought to what you'd want if that happened?"

Problem-Focused

"When you think about your own aging plan, what keeps you up at night?"

Need More Support?

Reach out to bQuest for additional resources and guidance on navigating aging-related client conversations.

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3 Steps to Keep It Simple

1 **Step 1: Listen & Acknowledge**

- Let them share concerns or stories
- Note who is in their support network and any gaps

2 **Step 2: Identify Red Flags**

- No plan for increasing care needs?
- Adult child feeling overwhelmed?
- No local family? Solo ager?
- No legal or financial protections in place?

3 **Step 3: Offer Support**

"Would you like help creating a plan or connecting to trusted care professionals? I have a resource - bQuest - that can help you figure out options that fit your family."

When to Bring It Up

- Annual or semi-annual reviews
- When discussing retirement income needs
- Any health scare or family change
- If the client is caring for an aging parent or loved one

Your Role

- Let them share concerns or stories
- You don't need all the answers - just open the door.
- Use our vetted care coordination team to provide expertise and next steps.
- Reach out if you'd like help customizing these prompts or practicing them!

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