STARTING THE AGING CARE CONVERSATION

If your client is the *caregiver*

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

Caregiver Planning

"Have you and your parent talked about what they'd want if more help was needed down the road?"

Value Based

"Many families I work with wish they'd had a plan earlier. Would you like to talk through what support and care could look like — and what resources are available to help?"

Empathy Opener

"I know you're doing a lot to support your [mom/dad/relative] right now. How are you holding up? What's been the hardest part?"

Observational Lens

"I've noticed more of my clients are juggling financial planning alongside caring for aging parents. How are you finding that balance?"

Time and Relationship Focused

"I know your [mom/dad/relative] just had that health scare. I've partners with a platform that helps families navigate aging care with the same confidence we bring to your financial planning. Would you like to hear about it?"

Need More Support?

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

STARTING THE AGING CARE CONVERSATION

If your client is the *caregiver*

CARE COORDINATION

POWERED BY bQuest

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!

Need More Support?

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

bQ.