THE ADVISOR GUIDE

Purpose of This Guide

bQuest was designed to make you the hero in your clients' most complex life moments without adding work, risk, or requiring you to become an aging-care expert.

This guide provides **clear, practical answers** to the most common advisor questions:

- How do I talk about bQuest with clients?
- How do I integrate this into my workflow?
- How do I start longevity conversations naturally?
- How do I guide clients once care needs arise?
- How do I connect clients to trusted providers?

Each section includes **direct links to ready-to-use assets**, best practices, and tutorials.

How to Confidently Support Clients Through Longevity Planning

All referenced resources can be accessed here:

Advisor Resource Center

bQuest

Table of Contents

Have Questions About bQuest?

Book a 15-minute session or send us a note to get personalized support and guidance. Whether you're exploring use cases for your clients or need help navigating the platform, we're here to help you get the most out of bQuest.

Book a call

Advisor Office Hours

Send us an email

christine@thebquest.com

Section 1

How Do I Communicate the bQuest Care Coordination Program to Clients?

The Goal

Introduce bQuest as a natural extension of your holistic planning, not a separate product, referral list, or add-on.

bQuest should feel like:

- An exclusive benefit of working with your firm
- A proactive layer of longevity and family support
- A safety net for moments when life gets complicated

Best Practices

- Lead with care
- Position bQuest as support, not outsourcing
- Normalize aging and caregiving as universal
- Reinforce that you remain the trusted advisor

Recommended Language

"As part of how we support families long-term, we offer access to bQuest: a care coordination platform that helps clients navigate aging, caregiving, and major life transitions with trusted experts."

Client Communication Assets

Use these ready-made materials:

- Client-facing one-pagers
- Slide Deck for Client Meetings
- Aging Well Guide
- Marketing Best Practices

Recommended Tools in the Advisor Resource Center:

- Client Facing Resources
- bQuest Best Practices: Communicating Value

Section 2

How Do I Integrate bQuest Into Our Existing Workflows?

The Goal

Seamlessly embed bQuest into moments that already exist in your advisory process.

Where bQuest Fits Naturally

- Annual & semi-annual reviews
- Retirement planning conversations
- Estate & legacy planning discussions
- Life events (illness, caregiving, loss, relocation) and financial planning reassessments
- Multi-generational planning conversations

Common Integration Models

Seamlessly embed bQuest into moments that already exist in your advisory process.

- Advisor-led introduction of bQuest and resources available to the client
- Client-initiated access with advisor visibility to the bQuest Platform
- White-glove service via Care Concierge
- Firm-wide incentives centered on the client experience and education

Recommended Tools in the Advisor Resource Center:
bQuest Best Practices: The Advisor Playbook

Section 3

How Do I Start the Conversation Around Longevity Planning?

The Goal

Make longevity, aging, and caregiving a normal, proactive planning topic.

Where bQuest Fits Naturally

- Ask open-ended, values-based questions
- Tie longevity to financial risk, family dynamics, and planning outcomes
- Normalize the conversation early - before crisis

Conversation Starters Advisors Love

- “Who would step in if a health issue made finances harder to manage?”
- “Have you had to support a parent or loved one as they aged?”
- “What does aging well look like for you and your family?”
- “Are there people depending on you, or who may depend on you in the future?”

Tools to Support You

Conversation Starter Prompts

Conversation aids designed to facilitate two-way dialogue between advisor and client.

Recommended Tools in the Advisor Resource Center:
- Starting the Conversation: Supporting Clients Who Are Caregivers
- Starting the Conversation: Clients Planning for Their Own Aging Journey
- Aging Well Guide
- Care Compass Educational Email Series

Section 4

How Do I Guide My Clients on Next Steps Once Needs Arise?

The Goal

Help clients move from overwhelm → clarity → action without you needing to manage care logistics.

Recommended Client Path

bQuest supports clients in stages - starting with education, moving to targeted referrals, and escalating to human support only when needed.

1 Client Explores Educational Resources

- Webinars, Email Education Series, bQuest Resource Hub
- Purpose: Establish baseline understanding before decisions are required.
- Client value: Clear, practical information without pressure.
- Advisor value: More informed conversations; fewer reactive questions.

2 Client Receives Personalized Recommendations

- Advisor or client uses the bQuest Platform to identify Relevant service providers via Matchmaking
- Purpose: Translate client needs into vetted, relevant options.
- Client value: Focused next steps
- Advisor value: Confident referrals without owning care logistics.

3 Care Concierge Engages When Complexity Increases

- Advisor refers client to bQuest Care Concierge
- Purpose: Provide hands-on coordination when situations become complex.
- Client value: Human support during high-stress or urgent moments.
- Advisor value: Clients supported without advisor scope creep.

Recommended Tools in the Advisor Resource Center:
- Webinar Series Schedule
- Care Concierge Overview Assets

Section 5

How Do I Connect My Clients With Trusted Service Providers?

The Goal

Confidently connect clients to **vetted, high-quality service providers,** without liability or guesswork.

What Makes bQuest Different

- Providers are vetted across the continuum of care
- Matching is personalized by geography, need, and timing
- Referrals enhance your relationship
- Advisors maintain visibility and control

Your Support Tools

- Marketing Asset Materials
- Advisor dashboard
- The bQuest Advisor Guide

Final Thought for Advisors

> Aging, caregiving, and longevity planning are core human experiences that directly impact financial outcomes, family dynamics, and trust.
>
> bQuest enables you to meet clients where life actually happens with confidence, clarity, and support.

You don't have to be the expert.
You just need the right partner.

Client Journey Visual (Advisor View)

From Proactive Planning to Crisis Support

Think of the bQuest journey as progressive. Clients can enter at any point and may move in and out of care needed. bQuest stays with them through every step of the journey.

1

Stage 1: Awareness & Planning

Client mindset:

"I want to be prepared for myself or my family."

Advisor action:

- Encourage exploration
- Share relevant content or webinars

bQuest tools:

- Aging Well Guide
- Conversation Starters
- Care Compass Educational Email Series
- Webinar Series

2

Stage 2: Exploration

Client mindset:

"I'm starting to think about what this could look like."

Advisor action:

- Provide bQuest recommendations
- Maintain visibility as a resource for your clients

bQuest tools:

- Webinar Series
- Resource Hub on Platform

3

Stage 3: Decision Support

Client mindset:

"I need direction. There are too many options."

Advisor action:

- Provide bQuest recommendations
- Maintain visibility as a resource for your clients

bQuest tools:

- Personalized provider matching
- Advisor-informed recommendations

4

Stage 4: Active Coordination

Client mindset:

"I need help now."

Advisor action:

- Escalate to Care Concierge
- Reassure client they're supported

bQuest tools:

- Human care concierge
- Provider coordination
- Family support

5

Stage 5: Ongoing Support & Transitions

Client mindset:

"This isn't a one-time event."

Advisor action:

- Revisit bQuest as needs evolve
- Reinforce long-term partnership

bQuest tools:

- Continued guidance
- Transition support
- After-loss resources (when applicable)

When to Introduce bQuest:
Advisor Checklist

Use this checklist to identify ideal moments to introduce bQuest before urgency hits.

Always Appropriate Moments

- ◯ Annual or semi-annual review
- ◯ Retirement planning discussions
- ◯ Estate or legacy planning conversations
- ◯ Multi-generational family meetings

Client Signals to Listen For

- ◯ "We're helping my parents more lately..."
- ◯ "Something feels off, but we're not sure yet"
- ◯ "We don't know where to start"
- ◯ "There are so many options, it's overwhelming"
- ◯ "My sibling and I don't agree on next steps"

Life Events That Trigger bQuest

- ◯ Health diagnosis or cognitive concerns
- ◯ Hospitalization or rehab stay
- ◯ Caregiver burnout
- ◯ Home safety concerns
- ◯ Considering senior living
- ◯ Loss of a spouse or partner
- ◯ Adult children stepping into decision-making

Advisor Rule of Thumb

If a situation involves:

- Family dynamics
- Uncertainty or overwhelm
- Health + finances intersecting
- Risk to continuity of planning

It's the right time for

bQuest