



SERVICES

Hourly Consulting

For those who are not interested in planning services but are in need of consultation.

- 5 Hour Retainer and billed in 10 minute increments

Introductory Aging Plan

A proactive plan for aging that begins with learning about you, your goals as you age, what your current situation is, and a financial snapshot which provides us the information we need to develop a customized Aging Plan based upon your needs.

Care Matrix Hybrid

An in depth report on 5-8 care communities in one geographic location. Report includes availability, admission criteria, pricing, floor plans, camera policies, state survey history, etc.

- Includes an initial call/zoom with the family to learn what geographic area/location to explore as well as financial and insurance information to begin research • A call/zoom meeting to review the matrix summary, access supplemental folders and "Tools for Success" • Additional Matrix available for added locations at an additional cost

Comprehensive Aging Plan*

A comprehensive plan that provides information and education on aging, dementia, patient advocacy, care options, facility touring and interviewing, and includes the "Introductory Plan" details. Also consists of five facilitated family meetings incorporating aging goals, financial and insurance resources for care, outlining and implementation of the aging plan, and discussion of the care matrix project.

- Includes: 1 Facility matrix location • Tools for Care Level Options • Touring Facilities with Confidence • Advocacy Checklist • Grab and Go Binder (a document organization tool-11 tabs with suggested checklist behind each tab) • A complimentary copy of "The Invisible Patient: The Emotional, Financial, and Physical Toll on Family Caregivers.

*Price varies on severity of case

Aging Plan Annual Package

Our Comprehensive Aging Plan that includes ongoing support from Annalee or our Leadership team, with additional customizable options based upon your needs.

