

How to Effectively Build a Synergistic Relationship Between a Home Care Agency and an Attorney.

There are many areas of law. When considering how to increase your agency through the effective building of professional relationships with attorneys, wealth advisors and trust officers, consider the following:

1. Those attorneys who are a vital referral source for all home care professionals include the following:
 - a. Elder Law and those certified to practice have the designation "CELA" or Certified Elder Law Attorney
 - b. Estate Planning Attorney
 - c. EP/ELA who specialize in Medicaid Planning
 - d. Real Estate Attorneys
 - e. Attorneys who work with Special Needs or draft SNTs
 - f. Family Lawyers
 - g. Personal Injury Attorneys
 - h. Attorneys who work with high net worth or those who are dually licensed: CPA, CFP, wealth advisor, insurance agent.

NOTES:

There are times older adults and or their families meet with estate planning/elder law attorneys and raise often complicated eldercare issues.

1. in-home vs nursing/AL care
2. personal service contracts and the implications
3. caregiver education and training
4. legal and care quality issues of hiring a personal friend vs. a licensed agency caregiver
5. healthcare directives
6. in-home care assessment to determine true needs

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What does an attorney or wealth advisor want from you?

1. An educator – someone who can assist and enhance the client counseling process with accurate information as it relates to in home care vs nursing home care. What differences are there today and in the near future? What are the considerations?
2. A mutual referral source (materials, clients)
3. An ability to provide valuable introductions
4. A co-presenter
5. An agency, owner or leader who share the same ethical, and quality professional values. If you lean on the edge of unethical practice in any way, shape or form...DO NOT even consider approaching an attorney unless you want to face legal implications.
6. Potential to build care assessment network (i.e. VA)
7. Community Liaison

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How do you approach these professionals successfully?

1. Research the attorneys in your geographic area
2. Select 2-3 and research the attorney and their firm
3. Put together a package geared at their firm, client base and the attorney themselves i.e. introduce yourself/value of your agency/history/awards, acknowledgements/accreditations, etc. and provide clear, concise client educational materials
4. Highlight your value and your network of opportunity you can provide them. How you can effectively enhance the client counseling process, name drop i.e. D/C planners, DONs, LTC/AL Administrators, Community Network
 - a. i.e. these days, business is difficult but we still have an obligation to assist those who are aging. Please allow me to introduce myself - how together we can enhance the client process - services that we both independently offer, etc.

NOTES:

- b. provide copies of and information that you have. You may want to produce pieces that are specifically created for these attorneys and their clients.
- c. Offer network opportunities and furnish copies of upcoming meetings that they may attend alone or are welcome to attend with you
- d. When can we meet? I will call your office in a few days to schedule an appointment to come into your office. You are welcome to visit ours, as well. Look forward to working together, etc.
- e. CLEAR sheet on HOW YOU CAN HELP THEM. i.e.
 - a. Referrals- our clients often come to us without proper planning including no advance directives, living will, etc. We are looking to partner with a firm who offers the same level of ethical and quality service and who will offer our clients the peace of mind they need.
 - b. Dual Presenter – in today’s economy and the fear of losing your valued assets, we are looking for an effective EP/ELA to speak to our groups of aging clients.
 - c. Resource Materials – you hand out ours and we will hand out yours

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About the Presenter and Resources for You:

For over ten years, Serena Brock has focused on the importance of the synergistic relationship between attorneys, financial planners and home care owners to support the fast growing baby boomer population.

As a successful entrepreneur, Ms. Brock has built and grown many of her own companies, as well as client companies. Currently, she is the CEO of Avenue HomeCare, a skilled and non-skilled agency offering service in 13 counties in North Carolina; Avenue Home Health Care (AHHC), a national home care agency that has established relationships with elder law, estate planning, Medicaid planning attorneys and home care agencies across the country for the facilitation of in-home care as it relates to the VA Aide & Attendance qualification and benefits. Brock MacNeill, her national marketing/advertising agency, was recruited to bring its business to the USA from her native Canada, over 11 years ago. Today, its tremendous success is shared with 6 year business partner, Liz MacNeill, and has continued to see enormous growth in its now, 17 years of business. This agency has effectively leveraged law firms and healthcare/home care agencies through its strategic marketing and consulting services. Serenabrock.com, a media website that advertises and refers clients, continues to generate enormous online hits. In 2009, her newest venture, Fortune High Tech Marketing offers Ms. Brock the best of all worlds: helping and teaching people how to make money and build wealth even in today's economic downturn.

Today, a compelling and much sought after speaker, Ms. Brock lends her expertise and support on a regular basis to organizations such as NNEPA (The National Network for Estate Planning Attorneys), MPS (A National Membership Organization that trains attorneys in Medicaid Planning, Strategic Marketing and Practice Efficiency), NAELA (The National Association for Elder Law Attorneys), PDHCA, Elder Law Answers, various presentations for SOFA (Society of Financial Planners) and state Estate Planning Councils. She currently also serves as a member of The North Carolina Government Affairs Committee, advocating for government funding and support, governance of national agency licensure, and agency ethical/quality care; The Board of the North Carolina Guardian ad Litem Foundation; The Lupus Foundation; World Orphans Day - Global Click Program; and her own Foundation which hosts an annual Christmas Open House, raising money and gifts for the children of DSS (Family and Children's Services).

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