

RAYMOND JAMES

TRUST COMPANIES

Estate Planning Education Series

CareGiver Services™ Now Available

Many Raymond James clients are increasingly faced with the issue of providing professional care for their parents or loved ones with chronic illnesses or disabilities. Well-intentioned families of those in need often try to personally provide the necessary level of care but quickly realize that caregiving is time-consuming, expensive and is best administered by qualified specialists.

To support families in their efforts to properly plan, Raymond James now offers CareGiver Services™ to clients through a partnership with Rona Bartelstone Associates, Inc. to provide a national, all-inclusive resource for information, assessment, care planning and implementation, and monitoring of care.

Rona Bartelstone Associates, Inc. (RBA) of Ft. Lauderdale, Florida has 21 years of professional caregiving experience as one of the nation's first care management companies. RBA has a network of highly educated, trained and credentialed care managers around the country who will deliver services to the Raymond James' clients on a local level.

Working with RBA, you and your Financial Advisor have access to a national network of caregiving professionals dedicated to providing various levels of service. They offer individualized solutions that are developed using objective input and are designed to provide peace of mind for you and your family.

Description of Services

CareGiver Services offers many different levels of service via RBA. Below is a short description of each level, starting with the most basic first and progressing to more integrated solutions.

Initial Interest

If you'd like to learn more about CareGiver Services call your Financial Advisor. He/She will contact RBA and participate in a free phone consultation on your behalf and relay the information back to you.

Consultation

This is a fee-for-service consultation that will take approximately 1 to 1-1/2 hours. During this time, staff from RBA will communicate with you to get an in-depth understanding of the your concerns, including the health issues, living situation, functional abilities, cognitive abilities, family and financial resources, and the life preferences of the person needing care.

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On-site Assessment

The on-site assessment assures that a professional, objective assessment of the current care situation for the care recipient is made prior to recommending services or steps to address the needs.

Care Plan Recommendations

Based upon the input of the family and the person needing care, RBA staff will recommend a care plan that meets your needs, your family's needs and the needs of the person requiring care. This plan will be consistent with the available resources, preferences and lifestyle of the individual needing care.

Care Plan Implementation

If you or your family is not able to implement the care plan because of time, distance or relationship issues, RBA staff is available to do so. Often there are issues such as:

- ◆ educating providers about the needs of the individual,
- ◆ advocating for services with the fragmented health and social service delivery systems and
- ◆ introducing services in a manner that is acceptable to the person needing care.

Because this is an adjustment for the care recipient, it may be necessary to introduce services slowly rather than all at once.

Care Plan Monitoring

RBA staff can monitor the on-going quality and necessity of the care if you or your family is not able to do so.

Travel & Relocation

If you decide that you need to relocate the care recipient, RBA can arrange for any special travel needs. When necessary, RBA can also provide health care staff to accompany him/her during relocation.

Placements into Assisted Living or Nursing Care Facilities

If you decide that placement into a care facility is necessary, choosing just the right facility requires a knowledge of levels of care, payment mechanisms, additional services, culture and quality of care. RBA staff can help you make the best match possible given the needs and resources of the individual.

Just as your Financial Advisor can help you plan for retirement or your children's education, he or she can also help you prepare for any professional care needs. For more information about CareGiver Services, please call your Financial Advisor.