



# Care management



Solutions supporting an enhanced quality of life

# An empathetic approach. A holistic point of view.

Finding the resources to manage the health and lifestyle needs of aging adults or people with disabilities is never easy. Loved ones who take responsibility for them want to ensure that they are cared for properly, professionally, and compassionately and that their best interests are always protected.

Our care managers work closely with clients, families, and medical providers so that all their **medical, physical, psychosocial, and environmental** needs are addressed. As one of the industry's largest independent care management companies with more than 25 years of experience, you can rest assured that we have the comprehensive resources to provide effective services focused on quality of life, safety, and wellbeing.

No matter your circumstances, our care management services are thoughtfully aligned with your Raymond James financial advisor. Together, we ensure costs are managed, your loved one's interests are safeguarded, and a thoughtful long-term plan is in place to support their well-being.

**RAYMOND JAMES**



22%\*

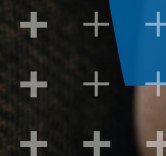
PERCENTAGE OF THE US POPULATION  
THAT WILL BE 65 YEARS OR OLDER  
BY 2040

11%\*\*

PERCENTAGE OF THE US POPULATION  
THAT HAS A SELF-CARE OR MOBILITY  
RELATED DISABILITY

\* US Department of Health and Human Services

\*\* CDC





# An individualized approach

## Your loved one's advocate

Caring for those suffering from loss of mobility and chronic age-related diseases can be challenging; there is no one-size-fits-all solution. This is why we approach each client individually as their advocate with the goal of providing excellent care, safety, and happiness.



At the beginning of our relationship, your care manager will complete a thorough assessment of your loved one's functional, physical, and cognitive status as well as their environment, financial, and legal situation. Based on that assessment of present and future needs, they will suggest a variety of solutions and give you the information you need to make informed decisions. This helps us to develop the best fit solution together from a holistic perspective.

From there, our care manager will arrange the appropriate services to meet their needs—continually protecting your loved one's best interests and fostering independence.

**Our holistic approach addresses all aspects of your loved one's life so that they remain safe, happy, and at home for as long as possible.**

## National reach, local compassionate service

Our network of care managers spans the entire country and is available to provide services to your aging or disabled loved one who lives far away. They are locals, so they are familiar with the local resources from medical providers to contractors and can recommend those that are the best fit. Additionally, equipped to broach subjects that may be difficult for families, friends, or other advisors to address, our care managers have the skills and knowledge to effectively identify challenges, have the tough conversations, and coordinate the appropriate local solutions.



# Compassionate experts

## The right credentials

Broadspire care managers are registered nurses or other professionals with master's degrees in social work or counseling—many with backgrounds in geriatrics or special needs. They each participate in extensive ongoing training and are required to maintain at least one national certification. With an average tenure of 15 years, they understand the intricacies of navigating social service and healthcare delivery systems. They have the skills to assess needs and interests, find local resources, and implement the best solutions for your loved one.

## An impartial voice

Our care management services are not associated with any home health agency, insurance carrier, or healthcare network. We do not have any financial incentives clouding our judgement. This enables us to provide a completely objective assessment of every situation to help so that your loved one gets the services that are most appropriate to their unique needs.



**“I supervise a staff of 400 and oversee a multi-million-dollar budget. I believe that excellent staff should be recognized for their dedication and professional service to clients and the community. My Broadspire Care Manager has gone above and beyond the call of duty to assist me and my family. At every turn, she has been there to deal with the many complicated and frustrating issues related to caring for an elderly parent. I want to thank you and your organization for the wonderful service provided.”**

Broadspire Care Management Client

## Many functions. One goal.

Our care managers take on many roles throughout the day to ensure that your loved one's needs are met—be it as their advocate, their medical advisor, or a surrogate family member. We are here to help with the management of your loved one's care and lifestyle needs for as long as you need us.

Our wide-ranging services may include screening in-home caregivers, hiring contractors for home modifications, attending or coordinating provider visits, planning outings, helping with applications for government programs, or visiting your loved one to celebrate a special occasion. Our constant focus is on improving their quality of life.

If placement in a rehabilitation or extended care facility is needed, our care manager can help with all the details including identifying the best option, validating credentialing, facilitating a tour, determining the best payment options, and coordinating completion of the necessary paperwork. Most importantly, they act in the best interests of your loved one to create their best life.

Throughout the process, we remain sensitive to costs and can be an important resource to help prevent your loved one from being taken advantage of. From a fiduciary and legal perspective, our care managers serve as healthcare representatives, evaluating health, needs, and interests so that the best care and services are provided.







# Supporting those with special needs

## Addressing complex challenges

In the case of children and adults with special needs, our care managers focus on opportunities to increase capabilities, independence, and quality of life. They work closely with parents and professional representatives so that these clients get the support and services they need to live a safe, happy, and fulfilling life. This may include tapping into community services to supplement existing care.

Through their experience and expertise, our care managers work to coordinate equipment and services to foster independence. Additionally, they provide transition coaching and support families with Independent Education Plan (IEP) meetings.

As with any other care management client, our professionals are alert to potential exploitation and quickly alert the authorities or legal representatives as needed.

# Broadspire's comprehensive care management services



## Healthcare advocacy

Our goal is to consistently provide our clients and their loved ones with the information they need to make the right lifestyle decisions. As their advocate, we focus on their unique needs and work to enhance their day-to-day life.

- In home assessment and recommendations
- Ongoing care coordination
- Crisis management
- Family education and guidance
- Environmental safety analysis



## Financial advocacy

Our professionals help our clients, their loved ones, and caregivers to apply for medical financial assistance as applicable and educate them on the appropriate management of those funds. Importantly, we also work with family members and caregivers to help recognize any potential financial exploitation.

- Assistance with state and federal benefit applications
- Family education to help prevent financial or other exploitation



## Specialty services

We can also help our clients and their families to locate specialty services related to continuing to live independently in their own home. This may include medication management equipment, monitoring services, or transitional living arrangement programs. These are the areas in which we excel and make a real difference.

- Medical care coordination
- Medication management
- Monitoring services
- Home life enrichment
- Transition coaching

For more information, speak with your sales representative or visit our [website](#).

## About Crawford & Company®

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