

Services and Resources to build the right team for your client

Area Agency on Aging – See **Florida Department of Elder Affairs** <http://elderaffairs.state.fl.us/>

Agency for Healthcare Administration - statutorily created by Chapter 20, Florida Statutes as the chief health policy and planning entity for the state. We are primarily responsible for the state's estimated \$25.2 billion Medicaid program that will serve a projected 4.27 million Floridians in SFY 2016-17, the licensure of the state's 48,500 health care facilities and the sharing of health care data through the Florida Center for Health Information and Policy Analysis. <https://ahca.myflorida.com/>

Aging Life Care Manager – (aka Geriatric Care Manager). Care Management describes the process of planning and coordinating care of the elderly and others with physical and/or mental impairments to meet their long term care needs, improve their quality of life, and maintain their independence for as long as possible. Aging Life Care Managers combine a working knowledge of health and psychology, human development, family dynamics, public and private resources and funding sources, while advocating for their clients throughout the continuum of care. www.aginglifecare.org/

Appraisers – <https://www.appraisers.org/>

Real Property – perform appraisals for various purposes such as sale, acquisition, ad valorem tax, eminent domain, insurance and forecasting. Real Property members specialize in the following appraisal specialties: Ad Valorem/Mass Appraisal (General and Residential)

Personal Property – perform appraisals for various purposes such as sale, acquisition, taxes, estate planning and more. Personal Property members can specialize in over twenty-six (26) specialties from fine arts to oriental rugs to Numismatics to fine wine.

Attorneys – Florida Bar <https://www.floridabar.org/>

Elder Law – area of legal practice that places an emphasis on those issues that affect the aging population and is comprised of the following areas: Estate planning and administration, including tax questions; Medicaid, disability and other long-term care issues; and Guardianship, conservatorship and commitment matters, including fiduciary administration. <https://afela.org/>

Estate Planning – the process of anticipating and arranging, during a person's life, for the management and disposal of that person's estate during the person's life and at and after death, while minimizing gift, estate, generation skipping transfer, and income tax. Estate planning includes planning for incapacity as well as a process of reducing or eliminating uncertainties over the administration of a probate and maximizing the value of the estate by reducing taxes and other expenses.

Probate - a state-licensed attorney who advises personal representatives, also called executors, and the beneficiaries of an estate on how to settle the final affairs of a deceased person.

CAPS Contractor - Certified Aging-in-Place Specialist designation for Contractors making aging-in-place home modifications to help seniors stay in their homes safely and securely. www.nahb.org/learn/designations/certified-aging-in-place-specialist.aspx

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Facility and Provider information – Research information regarding all levels of facilities, nursing homes, assisted living facilities, home health agencies, home care agencies and registries.

<https://floridahealthfinder.gov/index.html>

Florida Department of Elder Affairs - <http://elderaffairs.state.fl.us/> Administers programs and services for elders across the state of Florida through 11 **Area Agencies on Aging**, which operate as **Aging and Disability Resource Centers (ADRCs)**. The ADRCs provide information and assistance about state and federal benefits, as well as available local programs and services. <http://elderaffairs.state.fl.us/doea/arc.php> In addition, the **Comprehensive Assessment and Review for Long-Term Care Services (CARES)** (the assessment required for the Medicaid waiting list and assessments to determine an individual's level of care) can be found at <http://elderaffairs.state.fl.us/doea/cares.php>.

Fiduciary-related Services - A fiduciary is a person who holds a legal or ethical relationship of trust with one or more other parties (person or group of persons). Typically, a fiduciary prudently takes care of money or other asset for another person. In a fiduciary relationship, one person, in a position of vulnerability, justifiably vests confidence, good faith, reliance, and trust in another whose aid, advice or protection is sought in some matter. In such a relation good conscience requires the fiduciary to act at all times for the sole benefit and interest of the one who trusts.

Daily Money Manager - professionals who provide personal financial/bookkeeping services to older adults, people with disabilities, busy professionals, high net worth individuals, small businesses, and others.

secure.aadmm.com/

Guardian – a surrogate decision-maker appointed by the court to make either personal and/or financial decisions for a minor or for an adult with mental or physical disabilities. Guardianship is only warranted when no less restrictive alternative—such as durable power of attorney, trust, health care surrogate or proxy, or other form of pre-need directive—is found by the court to be appropriate and available.

www.floridaguardians.com/

Professional Fiduciary – serving as a trustee, executor, personal administrator or discretionary agent having direct responsibility for managing assets for or on behalf of individuals and families, as well as estates, trusts, private foundations and other entities they establish or control.

<https://professionalfiduciarycouncil.org/>

Geriatrician – doctor who is specially trained to evaluate and manage the unique healthcare needs and treatment preferences of older people.

Home Care Assistance – Any form of care given within the home or place of residence.

<https://floridahealthfinder.gov/index.html>

Home Health Agency (Medical) – skilled services which requires a physician's order, delivered by a licensed provider (nurses, therapists, social workers).

Home Care Agency (Non-Medical) – services provided by non-medical personnel (professional caregivers) including Respite, Personal Care, Companionship, and Homemaking.

Home Care Registry - the caregiver becomes the employee of whoever hires them, no liability or worker's compensation coverage.

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Investment Professionals – <https://www.finra.org/investors/learn-to-invest/choosing-investment-professional>

Brokers - Buy and sell securities for their customers, including individual investors. They are regulated by FINRA and the SEC.

Investment Advisers - Provide advice about securities tailored to the needs of their clients. They are regulated by the SEC or state securities regulators.

Financial Planners - Provide an array of financial services that vary from provider to provider. Regulation and licensing depends on the services offered.

Insurance Agents - Sell life, health and property insurance policies, and other insurance products, including annuities. They are regulated by state insurance commissions.

Accountants - Provide professional assistance with taxes and financial planning, tax reporting, auditing and management consulting. They are regulated by national and state licensing standards.

Medicare – comprehensive official US government site for Medicare. <https://www.medicare.gov/>

Medicare Nursing Home Compare – Compare nursing homes and most recent survey (inspection report). <https://www.medicare.gov/nursinghomecompare/search.html>

Palliative Care – an approach that improves the quality of life of patients and their families facing the problem associated with life-threatening illness, through the prevention and relief of suffering by means of early identification and assessment and treatment of pain and other problems, physical, psychosocial and spiritual. www.floridahospices.org/

Senior Move Manager - professionals who assist older adults and their families with the emotional and physical aspects of a later in life transition (de-clutter, aging-in-place, downsize/move and estate dispersal). www.nasmm.org/

SRES Realtor – Senior Real Estate Specialist designations for Realtors working with clients age 50+ through major financial and lifestyle transitions in relocating, refinancing, or selling the family home. www.sres.realtor/