



## Concierge Service: Family Life Cycle Management Case Study

The call came at 3:50 on a Sunday afternoon...“Pete, I’m not sure what to do about my mom. My dad passed, and she needs my help in a big way. How am I going to handle this...along with my new job? I’m so overwhelmed and anxious; I’m not sure where to start”.

The following is a case study centered on client experiences and my own. This story is not that different from those of many middle-aged professionals. Just when you think you can breathe a sigh of relief that your kids have grown up and have gone off to college, wham...it hits you. Your aged parents need help, often significant help, in ways you never imagined. Of course, these things can’t happen at a worse time...peak professional responsibility and peak earning years, at a time when you are supposed to be preparing long-range for your own retirement.

As I listened to a client’s list of worries about her mom that required immediate attention, I began writing them down...asking her to slow down. She asked, “Why are you asking me to slow down”? I told her that I was making a list that we could later begin to prioritize to get her the needed resources. In addition, I was adding things that she had not as yet considered.

Thirty minutes later we hung up the phone, she breathing a sigh of relief. She realized what I meant by 24/7 Concierge Service, that my role was not simply to help her manage her investments and planning goals, but that I was here to also help with holistic Total Family Life Cycle Management.

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A few weeks later we met; my client had a smile on her face. She had not only received the eldercare planner workbook I overnighted to her, but she had also received a “Battle Book” for her mom. In one place she had all the critical information she would need...from legal documents, location of safe deposit box key, a consolidated list of her mom’s doctors, medications, doses, and frequencies, etc.

During our conversation my client mentioned that her mom would clearly need to move from the family home which had become too much to handle. To the client’s surprise I produced the actions and priorities list that she and I had fashioned. Find: a geriatrician (check), a geriatric social worker/therapist (check), have the discussion with mom about the house (check), and so on, nearly 40 listed items (by no means completed).

At meeting’s end, my client said, “Thank you, where did you find all of this for me”? I told her that my professional and personal networks provided the insight, guidance, and connectivity...including my aunt”. She asked, “Your aunt”? I said, “Yes, if your mom should consider moving to an adult community, my aunt can tell her all about the good and bad of such places...without the sales pitch”. she laughed, smiled, and said...”Your aunt”?! I could tell that an immense burden had been removed, even though the process was by no means complete. She could get on with putting her full energy into her work, now that she fully understood what working with me truly meant.

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