



Agent under a Power of Attorney • Healthcare Surrogate Professional Guardian • LifeCare Manager

We provide comprehensive life care management and fiduciary services to seniors, persons with disabilities and other individuals in need throughout Florida. Our experienced, compassionate team has over 50 years of combined experience.

We serve as impassioned advocates on our clients' behalf. Our life care management services include healthcare planning, insurance management, housing coordination and exploitation prevention. As a professional fiduciary, we can serve as our clients' Independent Trustee, Agent under a Durable Power of Attorney, Healthcare Surrogate or Personal Representative for those who do not have family in-state or anyone else to help them. Our clients' assistance programs can range from legal and financial needs to medical, emotional and social needs.

What Makes Us Different?



Cost-Effective Collaboration

With a holistic, inclusive approach, we work to create a collaborative program to share information and solve problems in a timely, secure, and cost-effective manner.



Conflict-Free Service

We do not replace your other advisors – such as your attorney or CPA – and we do not sell financial products or services. We are part of the team protecting you and your family.



Fiduciary Standard of Care

As professionals, we practice a fiduciary standard of care 24/7. We act in your best interests at all times. You and your family ALWAYS come first.



Multi-Disciplinary Expertise

We have expertise in many areas. We can answer all of your questions or direct you to the right resource.

Our Approach

With each client, we start with an initial assessment. We understand that each client's situation is unique. Through discussion and research, we identify and understand the client's needs and concerns. From there, we develop a customized program of services to address the issues at hand and secure a safe and independent future.

Our Management Team



Shelley Rhoads Perry

A seasoned Florida-licensed trust and estates attorney with extensive fiduciary planning and administrative experience



Linda O. Flores

A Florida-registered Professional Guardian with more than 25 years of experience in the banking sector

SERVICES

AGENT UNDER A DURABLE POWER OF ATTORNEY: (POA)

- Provide professional fiduciary services as requested based on the best interests of the Principal and the provisions of the POA
- Safeguard financial and non-financial assets, including real estate, art and collectibles, and closely held business interests
- Provide bill payment services as requested
- Make distributions as needed on behalf of the Principal
- Maintain strict audit and due diligence procedures
- Assist with Principal's annual tax return preparation and filing
- Facilitate communications with Principal's advisors and family as directed

HEALTHCARE SURROGATE: (HCS)

- Review Advanced Directive documents (Healthcare Surrogate and Living Will)
- Facilitate medical health care decisions on your behalf when you are not able to do so; apply for medical benefits and appeal adverse decisions
- Advocate for you regarding medical records, prescriptions, insurance claims
- Boots-on-the-ground oversight and coordination when in the hospital or in need of other medical services
- Coordinate medical doctors to prevent duplication of doctors and medications – facilitate medication management

LIFECARE MANAGEMENT SERVICES:

- Coordinate all aspects of medical needs
- Manage health insurance claims and appeals
- Advise and assist with housing transitions
- Coordinate caregiver schedules and responsibilities
- Pay ongoing bills and expenses
- Coordinate meal home services
- Collect, organize and assist in gathering tax documents for tax preparation
- Help protect against abuse and exploitation from cyber criminals and financial scam artists