**Legal:**

 Elder Law attorneys

 Estate Planning attorneys

 Guardians ad litem – especially in areas where you can pick them

 Life Care Manager - Acts as fiduciary and as the Guardian or Conservator

under the court appointed Attorney. (Nationally Certified Guardian)

**Financial:**

Daily Money Manager

 Pay bills

 Watch for financial abuse

 Prepare paperwork for tax preparer/accountant

 Keep family in the loop regarding cognition, etc., if necessary

Tax specialists

Trust management companies

Financial Planner - General/Generational

Reverse Mortgage funding

Bankers – Home Equity Lines, Mortgage refinancing, etc.

Medicare and Insurance Planning

**Heath Care:**

Aging Life Care Manager® (Geriatric Care Manager) – They advocate for the

client to ensure their medical needs are met. They coordinate care, manage medications, etc. They work with in home health care companies, doctors and caring communities to ensure everything is going as needed

Support Groups – Cancer Champions, Memory Cafés, Parkinson’s support groups,

Alzheimer’s groups, etc., Almost every condition has a support group.

Preplanning cemetery and funeral advisor – (different people). Preplanning

does not count towards the 5 year Medicaid look back and makes the inevitable easier on the family members

 Medical equipment rental/purchase

 Ramp and stair chair rental/purchase

 Therapist – Always confirm that they are accepting new clients prior to giving the client

the referral. If they get up the nerve to call and then are rejected it can keep them from trying again.

**Tangible Property Management:**

Professional Organizer

 Those that do the same thing you do

In case you are booked up or unable to take a client

Out of your service area (near enough you may get referrals in that area)

 Those that do things you do not

 Business specialist

 Child education specialist

Photo organizer

Personal History Organization and preservation

Hoarding specialist

Those that take client with mental health issues

 Those that do pro-bono work or who have a sliding scale

Videographer – one who specializes in life stories

They capture the history of the family for the next generation. Can either capture stories of events that happened or discuss the items they are giving in their will, etc.

Appraisers – May be affiliated with an auction house. Independent ones may give

higher values. Appraisals can have multiple values based on if you are getting it for Insurance, replacement value or sales value. Be prepared for wildly different values based on which you choose

 Jewelry

 Art

 Furniture

 Rugs

 Musical Instruments

Estate Sale Companies – will sell items from the home on-site or will remove to

another sale to make it bigger. If not sold on-site there is usually a hauling fee. There is also usually a minimum amount of value needed in the home for them to take the job. Usually take 40-50% commission

Auction Houses – More selective than Estate Sale companies with what they will

take. This means more left to sell online or donate. Usually approx. 50% commission

Ebay seller – Removes item from home, photographs, describes, sales and ships.

Usually takes 40-45% commission

**Tangible Property Management:**

Paper Shredding Company – will come to the location and will shred the items on

site. May also shred hard-drives. To be cost effective you should have about 2 toters worth of paper to shred. Can provide a certificate of shred to prove the items were properly shredded.

Charities – Some have trucks to pick up donations. Items usually have to be either

in a garage or outdoors for them to take them. Often reject items so those will need to be brought back in and donated elsewhere.

 General items

 Medical equipment

 Animal items (shelters, etc)

 Homeless/Battered women shelters

 Sports equipment

Food Pantries – They have varying rules about what they will take but in general

food must be non-perishable and within expiration date.

Hauling Company – Trash and donations – They can come into the home to

remove items so that they don’t have to be put outside. Depending on the company you may or may not receive a donation receipt. They charge based on a percentage of how much of the truck is filled and there is always a minimum fee.

**Housing:**

Senior Housing Advisor (Certified Senior Advisor) – They know the local

Senior communities, what they offer in terms of lifestyle, services and costs. They help narrow down the options then arrange tours and take the client to visit the communities. They are usually at no cost to the client – they are paid by the community.

Real Estate Agent (Often has their own Home Stager)

 SRES designation means specializes in Seniors

 Home Stager (Certified stager) makes recommendations as to how to

improve the home for largest sales price. This includes colors, kitchen upgrades, etc. Also will dress the home (often with rental furniture) to make more appealing

Moving Company – local, national, international

**Trades**

General level of clutter

Maid service

Computer tech

Handyman/Contractor

 CAPS – senior specialists – widen doorways, install grab bars, etc

 Plumber

 Roofer

 Electrician

 HVAC

 Painters

 Drywall repair

Lawn Care

 Tree Care/Arborist

 Landscaper

 Snow Removal

Sewer maintenance (Roto Rooter type business)

Pest removal

Wildlife removal/maintenance

House call vets

House call doctors

 Severe level clutter

 Foundation Repair

 Basement waterproofing

 Biohazard Remediation

Structural Engineer

Home Inspector

Contractor (Class A) for major repairs

Trauma Therapist

House call vets

House call doctors

Extreme cleaners

 Government

Animal Control

Code compliance

Fire Marshall

Housing Department

Health Department

Mental health emergency team

Crisis Intervention Team (If present)

Hoarding Task force (If present)