

Healthcare and Differentiation in Estate Planning

Dr. Brian Dooreck
President and Founder Executive Health Navigation

What CPAs, Attorneys, and Financial Advisors Need to Know Today

Healthcare in Estate Planning



The Challenge



How do you recruit, retain, preserve, and serve these select families with differentiation?



Executive Health Navigation

Holding Attention

TIME

HEALTH • NEUROSCIENCE

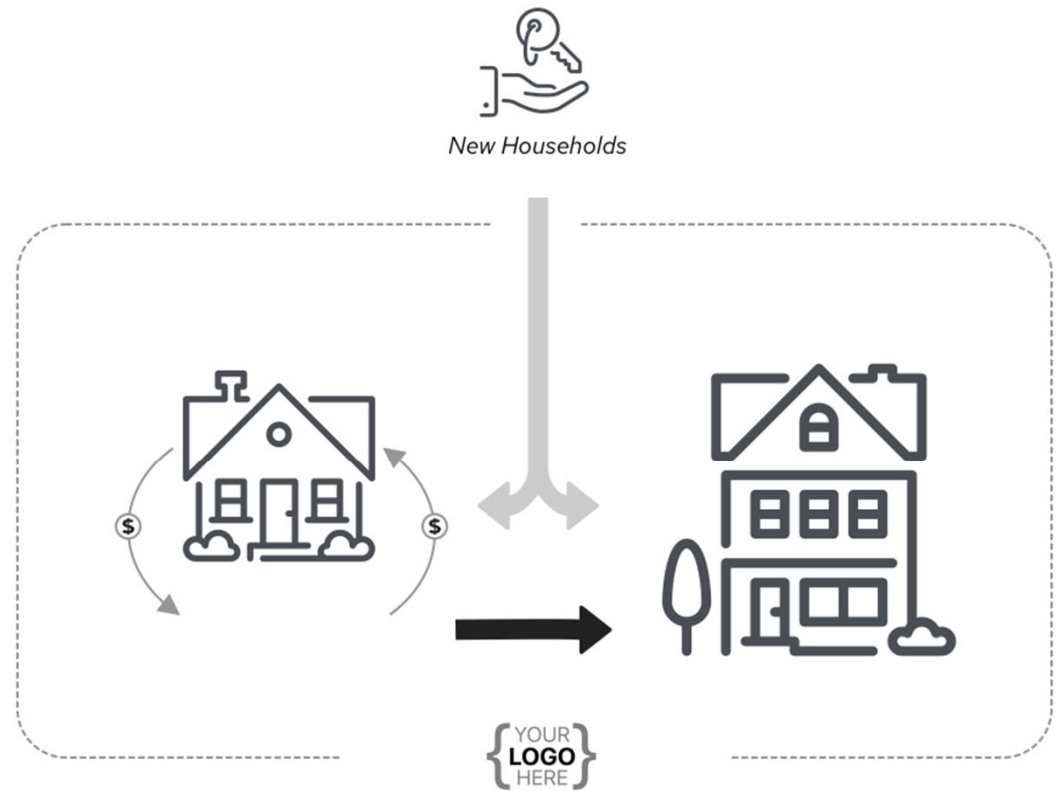
You Now Have a Shorter Attention Span Than a Goldfish

The New York Times

Feb. 11, 2022

It's Not Your Fault You Can't Pay Attention.
Here's Why.

The Big Idea



MEASURABLE VALUE

Client Retention · Client Recruitment · "Moving the wallet" · Advisor Retention · AUM Preservation

Evolving Options



Concierge
Medicine



Telemedicine



Private
Healthcare
Navigation

Our Process

How do your families navigate their healthcare?



How do you guide, direct, and serve these select families with differentiation?

Cognitive Assessment in Estate Planning

Cognitive Assessment in Estate Planning





ESSENTIAL HEALTHCARE PLANNING

What healthcare documents do you need? What planning is needed? Why is this so important?

Have the essential healthcare documents you need for the medical decision-making process completed and easily accessible.

This can save you time and unnecessary challenges in your life and that of your loved ones.

Once your children reach the age of 18 years, you may not be able to be part of their medical decisions.

Regardless if they are on your health insurance, live with you, or are claimed as a dependent on your taxes.

You need these four (4) healthcare documents:

1. **HIPAA release or authorization** allows healthcare providers to release medical information to anyone your child specifies on the form.
2. **Medical power of attorney** (healthcare power of attorney, designation of healthcare proxy, or durable power of attorney for healthcare) allows your child to choose an agent to make medical decisions if he or she cannot.
3. **Comprehensive medical record** includes all current and past diagnoses, surgeries, treatments, diagnostic test results, family medical history, and a list of current medications.
4. **Durable power of attorney** allows you to make financial decisions on your child's behalf, pay bills, and access financial information.

You'll need seven healthcare documents to access **your spouse, partner, or parents'** medical information and related financial information.

1. HIPAA authorization
2. Advance directive/Living will
3. Durable power of attorney for healthcare/healthcare proxy
4. Durable power of attorney
5. Complete medical records
6. Medicare, supplemental, and long-term care insurance policy information
7. Letter of instruction

Plan for your future health care. Advance care planning involves discussing and preparing for future decisions about your medical care if you become seriously ill or unable to communicate your wishes.

Having meaningful conversations with your loved ones is the most important part of advance care planning.

If this is a medical emergency, please dial 911 immediately or go to the nearest emergency room.

Sources: National Institute of Aging  National Institute on Aging

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The Core Services

The average family pays \$25,000–\$30,000 yearly for health insurance. What do you get?

It takes around 26 days for a new patient to get an appointment with a physician.

The wait is even longer in some specialties, with an average wait of 30+ days.

AMN/Merritt Hawkins' 2022 Survey of Physician Appointment Wait Times in 15 large metropolitan markets.

Average waits of 34.5 days for an appointment with a dermatologist and a 31.4 day wait for an appointment with an OB/GYN.



Today the world is changing.

Most people try to navigate the healthcare system alone—which does not work in the long run.

I know you are not like those people. Instead, you expect a higher level of care—the best doctors and effective results.

What we do offers true value. A value for what matters most.

HEALTHCARE PLANNING AND MEDICAL HISTORY SUMMARY

Create, Review, Secure, and Share Your Medical History Summary

One of the most overlooked essential elements of your healthcare.

Baseline Private Medical Visit Preparation Call

Review the available resources and prepare for what matters most.

We get you to the best doctors for your problem more quickly, easily, and effectively.

Initial Private Healthcare Navigation Call

Determine what your next steps should be and what options are available.

CASE ENGAGEMENT

Continually Updated, Reviewed, and Secured Medical History Summary

One of the most overlooked essential elements of your healthcare.

Assist and Facilitate Appointments for Primary Care and Specialty Providers

It takes ~26 days for a new patient to get an appointment with a physician.

Assist and Expedite Appointments for Labs, Imaging, and Procedures

Imagine MRI appointments in 3 days, not 3 weeks.

Ongoing Private Medical Visit Preparation Calls

Review the available resources and prepare for what matters most.

Ongoing Private Healthcare Navigation Calls

Determine what your next steps should be and what options are available.

Direct Calls to Your Primary Care and Specialty Providers

Elevate the level of care you and your family receive.

Direct Calls on Your Behalf to the ER, UCC, or Inpatient Nursing Stations

Who do you call in the ER on behalf of yourself or a family member, in any city?

Provide Navigation and Access to In-person or Virtual Second Opinions

The "right" second opinion can be a very valuable decision-making tool.

Individualized Care, Guidance, and Navigation —When and How You Need It

Life is not a straight line. It is very unpredictable. We see it every day.

Proven Value

Executive Health Navigation
Serving select Family Offices, Private Individuals, Registered Investment Advisors, High-Net-Worth Advisors, and C-Suites for over a decade.

CASE 1

MEDICAL HELP NEEDED

A family office client in Houston called. Their 4 1/2-year-old daughter experienced seizures for 6 months, and an abnormal MRI showing a "severe brain stem malformation" required an immediate pediatric neurosurgery consultation.

CLIENT EXPERIENCE

The family was unable to get an appointment at Texas Children's Hospital (the #2 pediatric neurosurgery program in the country, located in Houston). We worked with them to organize and prepare medical records, review questions, and plan for upcoming appointments, assuring them they were not alone.

OUTCOMES & RESULTS

We held a doctor-to-doctor call with the Chief of Pediatric Neurosurgery at Texas Children's Hospital the following contact with national leading specialists at Emory (Atlanta, Houston), and Mayo Clinic (Rochester). Appointments within 72 hours, and a 6-month observation was planned seen at both UTHealth Houston and Texas Children's Hospital.

UTHealth Houston Texas Children's Hospital EMORY HEALTHCARE

These are some of the many leading institutions we work with and have access to. For you.

"Your health is not always your decision. How you handle it is."

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CASE 3

MEDICAL HELP NEEDED

A client called seeking a new Primary Care Physician (PCP) in Miami. Local physicians were not taking any new patients.

CLIENT EXPERIENCE

They were unable to obtain a new PCP on their own. We worked with them to determine their needs and expectations from a new PCP, discussing the options available.

OUTCOMES & RESULTS

We found a new PCP about care for the client soon after to be seen that week.

and have access to. For you.

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CASE 2

MEDICAL HELP NEEDED

A family office client in Beverly Hills called. The client had a painful rash requiring immediate treatment due to imminent international travel. The next appointment available was in 3 weeks.

CLIENT EXPERIENCE

The client had trouble arranging an appointment before their departure.

OUTCOMES & RESULTS

We held a doctor-to-doctor conversation with the dermatologist. The client was seen first thing after the weekend.

Cedars Sinai

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CASE 4

MEDICAL HELP NEEDED

A client in Los Angeles called. Their daughter "was in the ER with appendicitis" and required immediate assistance.

CLIENT EXPERIENCE

The family needed help arranging care for their daughter across the country. Within 15 minutes, we had conversations with the Tufts Medical Center charge nurse, the ER physician, and the patient. We reviewed the care plan and assured the patient that she was not alone.

OUTCOMES & RESULTS

We maintained continual communication with the parents, patient, and ER, providing reassurance and expediting care. The patient was discharged later that night for a ruptured ovarian cyst. In a doctor-to-doctor conversation with the requested female OB-GYN at Brigham and Women's Hospital, we arranged an appointment for the following day.

Tufts Medical Center Brigham and Women's Hospital
Founding Member, Mass General Brigham

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"Your health is not always your decision. How you handle it is."

The Defining Level Of Service

You cannot control the markets —
But you can control the level of differentiating
service you offer.

Much of what we offer is unscripted. We are
here working with you. For you and your
families — to meet your needs.

FINANCIAL
MANAGEMENT

TANGIBLE
ASSET MANAGEMENT

RISK MANAGEMENT AND
FAMILY MATTERS

TRAVEL AND
CONCIERGE SERVICES

PATIENT ADVOCACY

- Private Healthcare Navigation
- Patient Advocacy
- Medical Visit Preparation
- Confidential Medical History Summary
- Global Health Travel Planning
- [Health Homepage](#)

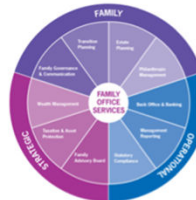
Our clients have already created significant wealth, so they look to us to help them protect and safeguard it through prudent wealth preservation strategies.

The Place

Where does this fit into [Your Firm]?

What is your biggest challenge in terms of differentiation of services?

What is the cost of doing nothing in this space?



C-Suites

We also selectively work with C-Suites; as presenteeism is usually tied to the health of oneself and/or their loved one.

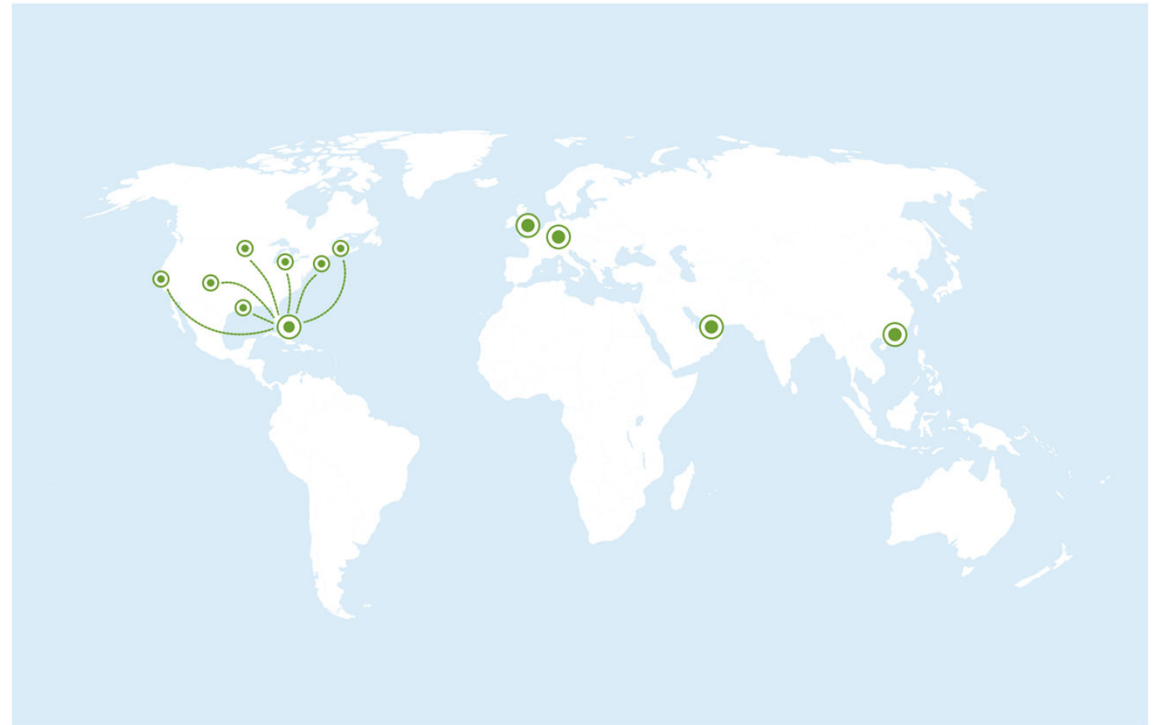
Time/Energy vs Presenteeism



*How do you support **health** for you,
your C-Suite Leadership Team, and your families?*



Global Access



We are not limited by geography.

These are some of the many leading institutions we work with and have access to.

For you. For your families.

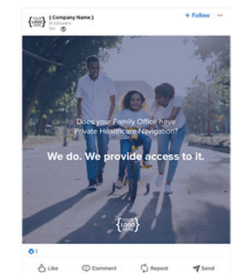
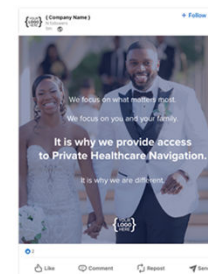
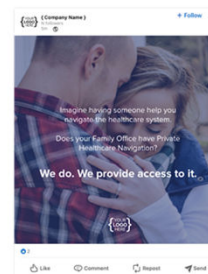
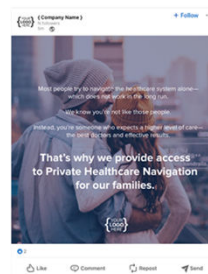
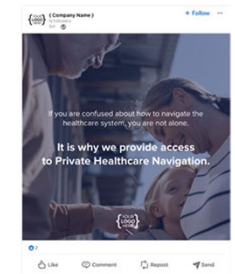
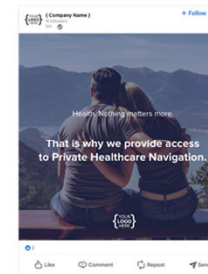
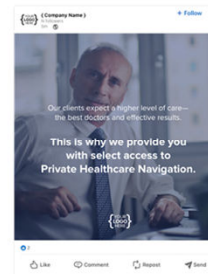
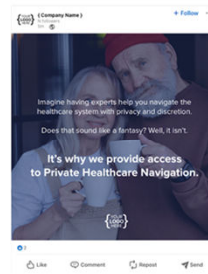
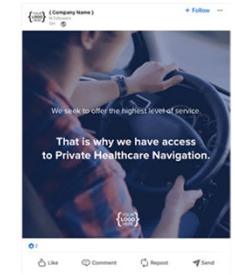
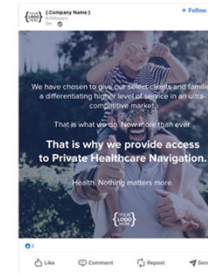
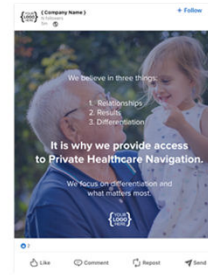
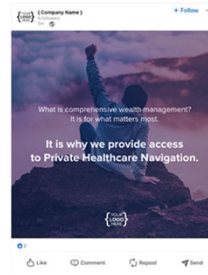


The Opportunity

Our service offering supports marketing this differentiator for you and your brand on LinkedIn and Google My Business as two main areas of focus.*

We know healthcare. We know marketing too.

**Instagram, Facebook, and Twitter are also easily handled.*





Executive Health Navigation

{ Company Name }

N followers

5m

+ Follow

...

What is comprehensive wealth management?
It is for what matters most.

**It is why we provide access
to Private Healthcare Navigation.**

2

Like

Comment

Repost

{ Company Name }

N followers

5m

+ Follow

...

Most people try to navigate the healthcare system, which does not work in the long run.

We know you're not like those people.

Instead, you're someone who expects a high quality of care from the best doctors and effective treatments.

**That's why we provide
to Private Healthcare Navigation
for our families.**

2

Like

Comment

Repost

Send

{ Company Name }

N followers

5m

+ Follow

...

Imagine having someone help you navigate the healthcare system.

Does your Family Office have Private Healthcare Navigation?

We do. We provide access to it.

2

Like

Comment

Repost

Send

{ Company Name }

N followers

5m

+ Follow

...

We focus on what matters most.

We focus on you and your family.

**It is why we provide access
to Private Healthcare Navigation.**

It is why we are different.

2

Like

Comment

Repost

Send

The Experience

REAL PEOPLE. REAL EXPERIENCES. REAL OUTCOMES.

Read some of many [Client Experiences](#)

Thank you as always and for making this very difficult journey easier. We couldn't ask for a more caring team to be with us. 🥰

 **Matthew J**
Local Guide · 41 reviews · 7 photos

★★★★★ 7 hours ago
I came to dr doorek looking for advice on how to help a close friend who was critically ill with an unknown constellation of symptoms. What was wonderful was, he was able to find us the person we needed to find to get the help that we needed- especially in the face of the canadian medical system being close to unnavigatable.

Would recommend him strongly for VIP/exec needs, and having an amazing network, with the mind to know where to look.

PS: Brian: Ben is doing alot better now and is no longer in and out of the ER, and now seeking a job and no longer effectively disabled. Thank you again for your help in our case, it was incredibly kind of you to help.

10/10

Dr Chang just called me and personally reviewed the results with me. That was awesome. Whatever you said claimed he game. Well done! So much appreciated!

 **Petros Grivas** 11:18 AM
To: Brian, Jonathan Cc: PCC & 2 more... >
Re: Referral and Guidance Needed
Thanks much Brian for the kind words. I cc my colleague, Dr. Jonathan Wright, who knows better about Urologists in Spokane area, he is a top Urologic Oncologist expert in bladder cancer.
Petros
[See More](#)

“ cancer. Brian jumped in and found a health care rep to walk him through his treatment options, provide transport to treatment, and be an in country rep for the family. I was blown away at how quickly he could mobilize resources.

Managing Director
Private Wealth Advisor
Investing with Impact Director
Lending Specialist
Senior Investment Management Consultant

Most importantly for today. Was it a positive experience? The encounter with Dr. Romanelli today?

Read 4:17 PM

Yes it was. The doctor told me to change course immediately with the meds I've been on. I suspected this was the correct tac.

Thanks again for your help, Brian. Ben's doing alot better these day thanks to the referral you provided to the exec health clinic in Toronto.

Great conversation. Very knowledgeable and eye opening for me 🙌



Executive**Health**Navigation

Your Differentiation



Our wealth advising team can help optimize your financial life — including health.





www.executivehealthnavigation.com