



Referral and Case Pricing Information

Overview of Services.

Our ***Pathfinder Guardianship Services*** provide professional guardianship services to incapacitated adults. As guardians, we insure our clients experience the highest quality of life by managing their assets and maintaining the highest level of professional integrity to ensure their needs and wishes are met.

Our ***Cavalry Advocacy Services*** provide adults with a health care proxy and financial power of attorney that is able to step in during times of crisis. By getting to know our clients, we can ensure their health care wishes are followed, that they receive quality care from the health care providers, and that their assets and income are protected and managed to meet *their* individual needs.

Case Referral Process and Acceptance Criteria.

At ***Scout*** we take our role as professional fiduciary very seriously. We strive to provide the highest quality of service to our clients. In order to do so, we must work hard on the front end to gather information necessary to help us decide whether we are able to meet the needs of the client before we agree to provide services. Several factors are considered, including our present service capacity, geography, the acuity level of the prospective client, what the client can reasonably afford in the way of paid services, and other extraneous factors

The referral process starts with a call or email to ***Scout***. In our follow-up, we will likely request additional information before we are able to accept the referral on the case. We understand that potential clients want an answer as quickly as possible and we strive to give clients a prompt answer.

Pricing.

Scout brings a team approach to its services. We keep track of the time spent on every case, billing by the tenth of an hour. We charge a different rate depending upon the nature of the services being provided. Our goal in billing is to charge the lowest hourly rate the nature of the work requires. We often partner with other outside professionals, such as nurse consultants and financial advisors, which have their own rates, to help us ensure that our client is receiving the best possible care and enjoying an optimal quality of life.

In 2016 our fee schedule is as follows:

Annual Retainer*

\$500 minimum

Hourly Fees†

Level 1 (“Senior“) – **\$200/hr.** : Higher-end health care advocacy work requiring negotiating or advocacy skills or higher-end judgments for the benefit of the client. (Examples: care problem resolution work; consulting with physicians over course of treatment decisions; care plan conferences; benefits advocacy; care plan development.)

Level 2 (“Fiduciary”) – **\$125/hr.:** Higher-end fiduciary work. (Examples: consulting with investment advisers; making decisions about property allocations; financial plan development; vendor billing analyses.)

Level 3 (“Case Management”) - **\$90/hr.:** Social worker or National Certified Guardian (NCG) level work in managing the normal care issues for the client. (Examples: management of home health care providers; care issue management; general accounts receivables and payables; consultation with financial planners and tax consultants.)

Level 4 (“Associate”) - **\$40/hr.:** Case-specific clerical and field work. (Examples: filing, copying, etc.; “eyes-and-ears visits”; real and personal property management.)

* The Annual Retainer applies only to our Cavalry Advocacy Services. This retainer allows **Scout** to be on-call throughout the year to answer questions, conduct yearly check-ins and respond to health crises.

† The Hourly Fees apply both to our Pathfinder Guardianship Services and our Cavalry Advocacy Services.