

Community Presentation

Financial Health Care Management

How Can Financial Health Care Managers Help?



While your doctors and care managers tend to your physical health, Financial Health Care Managers pay attention to the important financial details that others don't have the expertise to handle. They are part of your caregiving team and work with your family, caregivers, and advisors to ensure nothing falls through the cracks if you or a loved one become incapacitated.

They have the expertise to manage every aspect of financial health, from serving as a fiduciary, to reviewing and paying bills to managing property to coordinating health care services.



Presenters: Linda O. Flores and Shelley R. Perry, JD

Linda has been in the financial sector for over 25 years. She worked her way up from the ground floor into management by working in mortgage and commercial lending, retail and private banking services. Most recently as Vice President of private banking, she excelled in holistically managing her client's overall banking needs.

Shelley is a Florida licensed Trust & Estates attorney, who has also held senior fiduciary planning and administration positions in a multi-family office and corporate trust department, in addition to practicing in a boutique estate planning law firm.

Wednesday, February 28, 2018

2:00 p.m. until 3:30 p.m. Suite 33

Club Room Will Be Available

Alzheimer's Support Network