



Leveraging Care Management and Fiduciary Services
Presented by: Melissa M Leedom, CPA



Mission

We transform the weight of the world into a sigh of relief for our senior clients and their concerned loved ones. Secure Aging's care services help seniors to remain independent and maintain financial peace of mind.

Our amazing team includes a Certified Public Accountant, Licensed Registered Nurses and Certified Senior Advisors who have the experience and depth of knowledge to provide support and guidance for individuals and families as they navigate the aging process.

Who We Are...



Melissa Leedom, CPA

*Certified Public Accountant
Certified Senior Advisor*



Jana Hameed

*Director of Nurse Care
Management*

Fiduciary Services

What is a Fiduciary and Why would I need one?

- Key consideration in estate planning, discussion w/ Elder Law Attorney

When do these powers take effect?

- Advanced Directives: Durable Power of Attorney, Living Will, Health Care Surrogate Designation

Who is considered to be acting as a Fiduciary?

- Health Care Surrogate and Durable Power of Attorney
- Personal Representative and Successor Trustee

Who can be named as a Fiduciary?

- Family members- for DPOA can only be active for up to 3 individuals
- Licensed Professionals- Attorney, CPA, RN

Fiduciary Services - Durable Power of Attorney

An agent under a durable power of attorney makes financial decisions in your place in the event you experience cognitive or physical decline. Types of decisions could include:

Property Purchases/ Sales

Determine when to initiate state benefits

Banking

Bookkeeping and
Financial reporting

Coordinating with
professionals

Tax Return Preparation and
Filing

Retirement benefits and
distribution assistance

Initiate Long Term Care
insurance policy claims

Fiduciary Services - Items to Prepare for your Power of Attorney

- ❖ Bank Accounts - type, where located
- ❖ Safe Deposit Boxes - where located
- ❖ Investment accounts- retirement and non-retirement
- ❖ Other assets
- ❖ Income Sources - pension, SSI
- ❖ Insurances - long term care, auto, home
- ❖ Mortgage information
- ❖ Auto information

Fiduciary Services - Health Care Surrogate

Someone who will carry out your wishes regarding your health care if you are unable to communicate them due to a short- or long-term illness

Ensure a living will is in place
Ensure health care decisions are in accordance with living will

Personal wellness checks/ regular visits for medical updates

Engage medical specialists
Coordinate with families to ensure understanding of plan of care

Liaise with power of attorney to ensure financial ability to carry out plan of care

Document health history/ medical records management

Fiduciary Services - Items to Prepare for your Health Care Surrogate

- ❖ List of Doctors
- ❖ List of Medications
- ❖ List of Allergies
- ❖ Medical History
- ❖ Copy of Medical Insurance
- ❖ Any Prearrangements which have been made
- ❖ Copy of Living Will

Trust and Estate Administration

Personal Representative

Named agent in a last will whose role is to perform services for the estate

Performs services after person in need passes

Independent Trustee/Successor Trustee

Individual appointed in the trust document who acts as a fiduciary and executes wishes in trust document

May perform some services prior to person in need passing



Trust and Estate Administration

Personal Rep/ Independent Trustee assist with the following:

Coordinate
arrangements with
funeral
home/cemetery

Identify/notify
beneficiaries of the
trust or estate

Inventory and
appraise assets of
the estate or trust
and maintain
accounting

File tax returns for
the trust or estate
for decedent's final
year of life

Distribute assets to
beneficiaries/or
court

Close trust or
estate after all
obligations have
been fulfilled



**Successfully Plan and Manage Your
Health and Financial Independence**

Financial and Life Care Management

Services meant to empower seniors to navigate this stage of life with confidence and peace of mind

Financial Scenario Planning
Forecasting for future needs
Fraud detection/ education
Tax Preparation assistance
Mobile Notary

Monthly Budgeting
Bill Pay Support
Account Reconciliation
Create Financial Statements
Liase with Professionals
Legal Services Coordination
Medicare/Veterans Benefits

Aging in Place Planning/
Education
Household Needs Coordination
Community Placement
Assistance
Household Transition and
Oversight

Services Typically provided by financial and life care managers

Nurse Care Management

Who Could benefit from Nurse Care Management Services?



Individuals with new diagnoses/ chronic disease



Individuals facing mobility/ cognitive issues



Nurse Care Management Services



Home Wellness Checks

- Facility Quality of Care

Medication and Disease Management/Education

Doctor Appointment Coordination & Support

- Medical Record Management

Chronic Illness Education/ Monitoring

- Plan of Care Education/ Instruction / Oversight

MELISSA LEEDOM, CPA

Chief Executive Officer

Secure Aging is a care management company focusing on senior care management and senior advocacy. CEO Melissa Leedom is a Certified Public Accountant and has a Masters of Business Administration degree from Drexel University. She has worked at PriceWaterhouseCoopers and The Vanguard Group where she held various executive leadership positions in Finance, Accounting, Strategy, and Risk and Compliance.

In early 2019, Melissa joined the Secure Aging team. Eventually, she and several sibling owners acquired the business. Melissa is passionate about community-focused businesses and especially protecting our seniors from financial abuse and mistreatment.



941.761.9338

Melissa@SecureAging.com