



The  
Parent Care  
SOLUTION  
*A Legacy of Love...<sup>SM</sup>*



W O R K S H O P



*How do you care for  
your aging parents without  
financially or emotionally  
destroying your family?*

*Learn it today...  
use it tomorrow!*



## What is a Parent Care Specialist™?

A Parent Care Specialist (PCS) is a new professional designation that enables you to create an entirely different relationship with your clients and their children around long-term care. Through a unique process, The Parent Care Solution™, you will not only be able to help your clients discuss this issue, but plan for it as well.

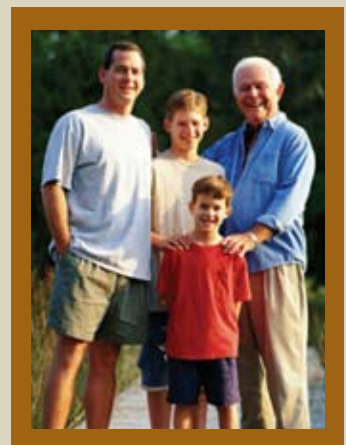


### THE WORKSHOP INTENT

- The PCS Workshop is designed to maximize learning and minimize fatigue.
- The day is divided into eight, 50-minute sessions plus an end of day 50-minute wrap-up session.
- The day alternates between instruction and practice sessions with plenty of hands on exercises.
- The Parent Care Quick Start Practice System™ lets you get started with your new practice immediately: In other words, a Complete Capability for you and your team.

### WORKSHOP TOPICS INCLUDE:

- The Parent Care Market Explosion
- How to use the Parent Care Specialist designation to build reputation and referrals
- How to use The Parent Care Design Tools™ to maximize your client's situation
- How to use the Parent Care Solution to leverage relationships with clients and their advisors
- How to build a fee-based practice without selling products
- How to use The Parent Care Solution Global Healthcare Power of Attorney
- How to become THE advisor for the 21st Century aging Baby Boomers
- How to gather all the financial information in 90 minutes or less
- How to create a complete Parent Care Plan using The Parent Care Snapshots™
- How to become the children's advisor and not just your client's
- How to create a Parent Care Management Trust
- How to become a Parent Care Private Trustee
- How to build a Parent Care Solution practice support team
- The Future as a Parent Care Specialist
- The Elder Care Market Dynamics



## *Complete Package of Everything You Need to Get Started on Day One*

### The Parent Care Solution™ Quick Start Practice System™

The Quick Start Practice System is our unique system to help you get started quickly and profitably from day one.

#### **As part of the Workshop you will receive:**

- Sample client agreements, disclosure and conflicts of interest documents
- Sample marketing brochures, attention letters, newspaper ads and direct mail pieces
- Automatic listing on the Parent Care Solution web site
- Sample stationery, letterhead, business cards
- Sample Parent Care Snapshot templates
- A one-year Parent Care Specialist license agreement
- Certification as a Parent Care Specialist
- Listing on the National Parent Care Specialist Network
- Parent Care Specialist public seminar presentation
- The newest books, articles, and information on the Parent Care phenomenon
- An autographed copy of Dan's book, The Parent Care Solution
- When available, Dan Taylor as your PCS seminar presenter



## **The Parent Care Conversation™**

A unique conversation strategy for providing connection, clarity and communication around the six critical Parent Care issues:

- The Big Picture
- The Property
- The Care
- The House
- The Money
- The Legacy



These six conversations separate you from other advisors and reinforce your role in designing the long term-care strategy for Baby Boomers and their parents. The Parent Care Conversations help you provide “deep support” to clients and their families.

#### **Course Qualifications**

- Three years as a Financial Advisor, Insurance Agent, Investment Advisor, CPA, Attorney or Healthcare Professional in good standing
- Completion of application form, acceptance
- Commitment to Parent Care as a practice specialty
- Participation in ongoing training as required
- Payment of an annual licensing fee

## **Workshop Plan:**

For an application please contact Dan Taylor at [dan@ParentCareSolution.com](mailto:dan@ParentCareSolution.com) or download it from the Parent Care Solution web site at [www.ParentCareSolution.com](http://www.ParentCareSolution.com)

#### **The Parent Care Solution**

3924 Cambridge Hill Lane  
Charlotte, NC 28270

T: 704.814.9965

F: 704.814.4722

On-site training available for groups of 10 or more

Photo by Ashley Sheffield



## Dan Taylor

As the creator of The Parent Care Solution™, Dan has designed a unique set of conversations for Baby Boomers, their parents and advisors around the subject of parent care. The Parent Care Solution™ is THE answer to the question of how you care for your aging parents without destroying your family financially or emotionally. It is an essential tool for the 21st century family.

Dan is a prolific writer of articles and author with over 60 published articles and 4 books to his credit. He has spoken nationally and internationally on a variety of subjects geared to people, relationships, and wealth. He has a Bachelor of Science degree in Communications and English as well as a law degree from West Virginia University School of Law.

He is a client and an associate coach with The Strategic Coach® program. He is a voracious reader, amateur gardener and a student of Constitutional Law particularly the rights of privacy and free speech. Dan makes his home in Charlotte, NC with his life partner, Christine Sheffield, her daughter, Ashley, and their 3 dogs, Katy, Roxanne, and Zack.



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