



# Adding the Care-Management Layer to Legal Planning

Practical implementation, objective assessment, and real-world coordination for Trust & Estate Attorneys.

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# Legal Planning Creates Authority. Care Management Makes it Work.



Documents may be signed, but families, trustees, guardians, and agents still need practical support. Purview is a support layer—not a replacement for legal counsel.

# What Legal Documents Do — and Do Not Do

## The Legal Structure



Create POA, trust, or guardianship authority.



Define fiduciary responsibility.



Document client wishes and planning intent.



Establish legal structure for future decisions.

## The Human Reality



Assess care needs, capacity concerns, or safety risks.



Coordinate medical, residential, or psychosocial support.



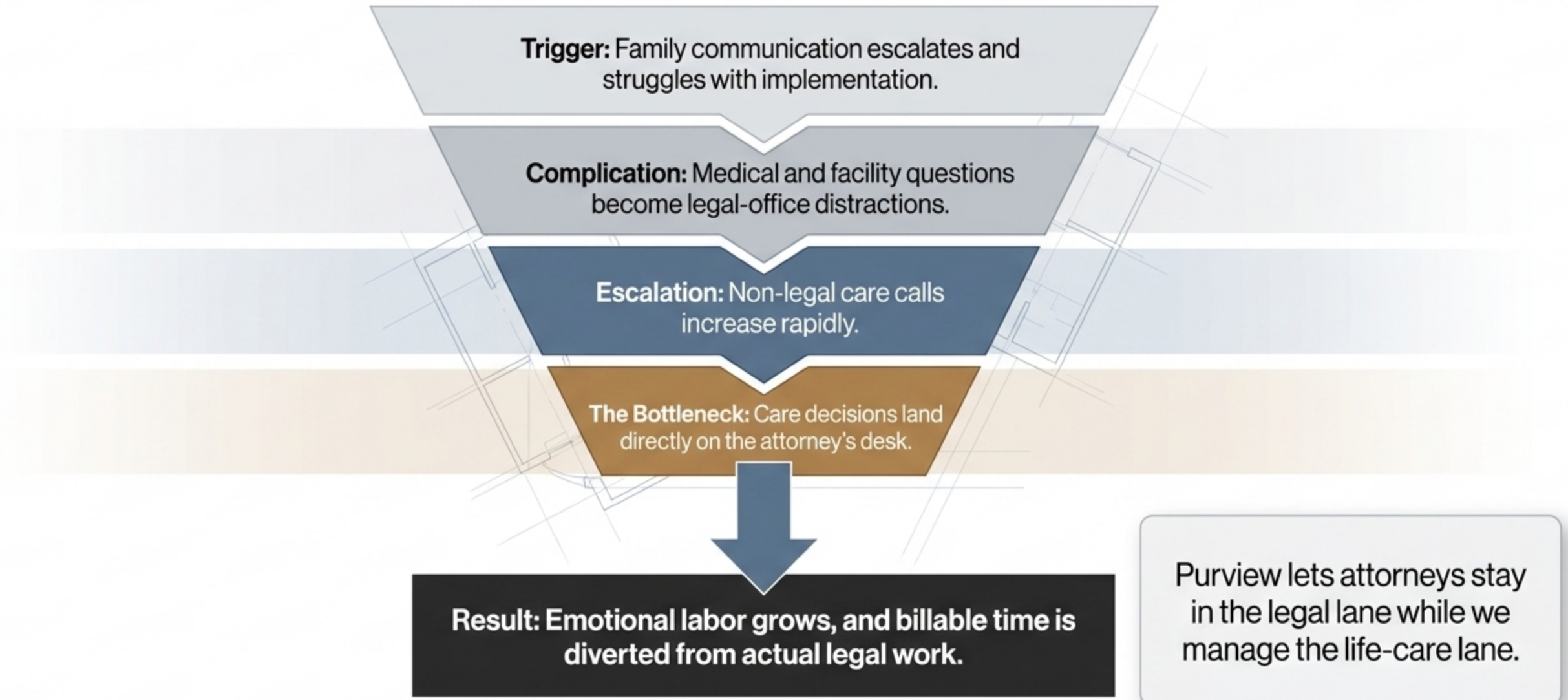
Monitor quality of life or implementation of the care plan.



Resolve family communication issues or provide human clarity.


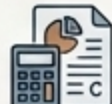


**Purview helps bridge the gap between legal authority and practical implementation.**

# The Unintended Default: Attorneys as Care Coordinators



# The Missing Professional Ecosystem

Care managers are to guardianship what CPAs are to taxes.

Need	Typical Professional	The Purview Connection
Trust Administration	 Trustee or Trust Company	Purview helps the human side of implementation.
Tax Issues	 CPA	Objective documentation supports decisions.
Investments	 Financial Advisor	Care visibility informs fiduciary judgment.
<b>Guardianship / Care Oversight</b>	 <b>Care Manager</b>	Assessment, advocacy, and coordination.

Just as courts rely on CPAs and trustees for **financial clarity**, families and legal professionals benefit from care managers for **human clarity**.

# The Purview Support Layer

Insulating the legal practice by acting as the definitive hub for all non-legal care matters.



## Care Assessment

Objective review of needs, safety, supports, placement, and care gaps.



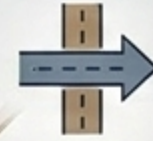
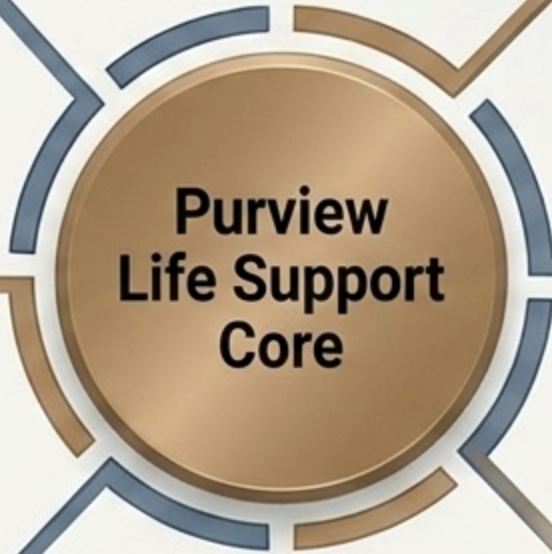
## Healthcare Advocacy

Coordination with physicians, facilities, family members, agents, and decision-makers.



## Guardianship Support

Agent-to-guardian assistance and practical implementation support.



## Special-Needs Support

Long-view planning, support coordination, and advocacy for beneficiaries.



## Fiduciary / Trustee Support

Objective visibility into care needs, quality of life, and implementation issues.



## Ongoing Care Coordination

Monitoring, communication support, and practical follow-through.

# Recognizing the Triggers: When to Add the Care Layer

## **The Out-of-State Family**

Adult children live outside Oklahoma. The client has documents and assets in place, but lacks reliable, local assessment and advocacy.

## **Capacity Questions**

Executive function, safety, or support needs require a practical, objective assessment rather than guesswork.

## **Fiduciary & Trustee Blind Spots**

A trustee is responsible for funds but requires objective insight into the beneficiary's condition, care setting, and quality of life before authorizing distributions.

## **Guardianship & Special Needs**

A beneficiary or protected person requires long-view coordination across medical, residential, psychosocial, and family systems.

# Objective Documentation Designed for Fiduciaries and Courts

Purview assessment reports and related documentation actively support:



Actionable care-plan clarity and recommendations.



Clear communication frameworks for divided families to collaborate.



Reduced guesswork for trustee and guardian decision-making.

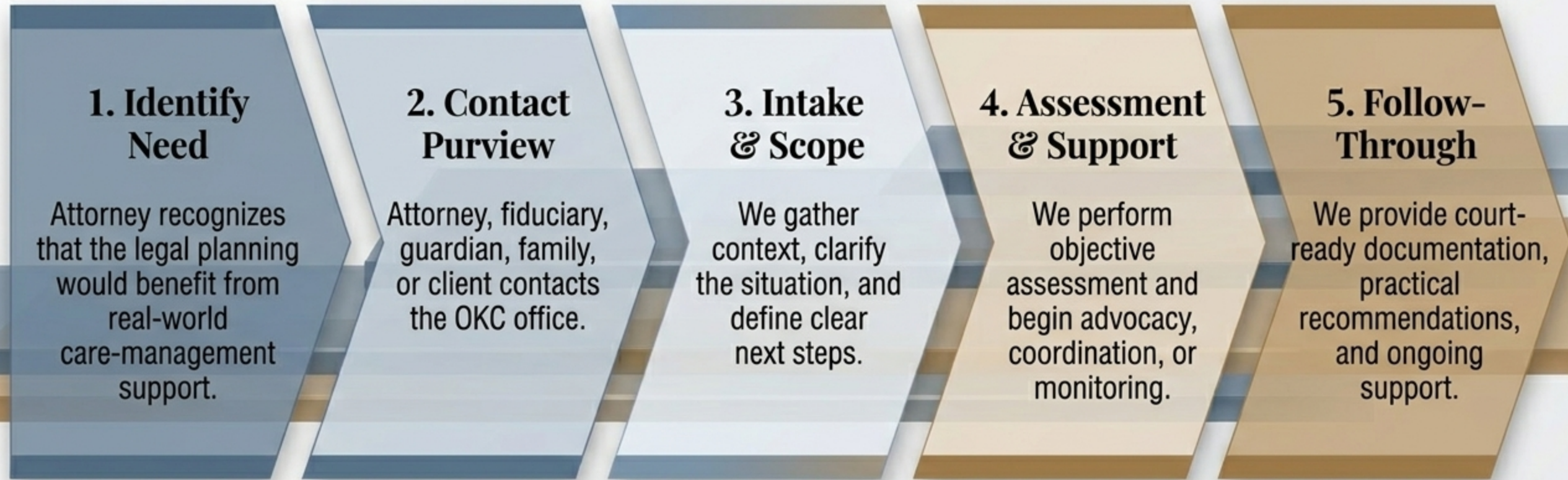


Attorney and court understanding of practical long-term needs for aging adults and special-needs beneficiaries.



Assessment reports and related documents are objective, rigorous, and admissible in court when appropriate.

# A Seamless Extension of Your Practice



Purview is a collaborative referral resource—not another burden on the attorney.

# Making Legal Responsibility Easier to Carry and Document.

Purview Life OKC supports the attorney-client relationship by adding the professional care-management layer that legal documents, fiduciary responsibility, guardianship, and special-needs planning demand.



**Next Step:** Schedule a short professional referral call or attorney briefing.

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