

# PURVIEW LIFE OKC

## Attorney Referral Guide

Professional care management for trust, estate, guardianship, fiduciary, and special-needs planning matters

**When legal planning requires real-world care coordination, Purview Life gives attorneys, fiduciaries, guardians, and families a qualified professional partner.**

### WHAT PURVIEW LIFE DOES

Purview Life provides professional life care management for aging adults, persons with disabilities, special-needs beneficiaries, fiduciaries, guardians, and families responsible for care decisions.

- Objective care assessments and long-view planning support
- Healthcare advocacy and care coordination
- Medical, residential, psychosocial, and family communication support
- Guardianship support and agent-to-guardian assistance
- Written recommendations and court-ready documentation when appropriate

### WHY ATTORNEYS USE PURVIEW

- Helps attorneys stay focused on legal work while care-management professionals support the life-care lane
- Supports trustees, guardians, fiduciaries, and families with objective facts
- Provides a collaborative resource before, during, and after complex care decisions
- Adds structure, communication, documentation, and accountability to care planning

### WHEN TO REFER

- A client needs objective care assessment or practical implementation support
- A trustee or guardian needs better visibility into care needs and living conditions
- Special-needs planning requires ongoing coordination or long-view support
- Healthcare POA support, advocacy, or medical coordination is needed
- Family members need a neutral professional voice around care decisions
- There is no reliable local family member or care overseer
- Written recommendations, assessment reports, or court-admissible documentation may be useful
- There are concerns about neglect, abuse, fraud, undue influence, or self-neglect

### REFERRAL LANGUAGE ATTORNEYS CAN USE

*“This issue has both legal and care-management components. I recommend you speak with Purview Life. They specialize in professional care assessment, advocacy, coordination, guardianship support, special-needs support, and documentation for families, fiduciaries, and legal professionals.”*

**Mike Giese, Principal - Purview Life OKC**

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