



An Advisor's Referral Guide To Health Advisory Services



This guide was developed for advisors who manage others' finances, assets, or legal affairs and want to help their clients maintain optimal health.

Consider Referring Your Client to a Health Advisor in the Following Situations:

Medical Conditions or Healthcare Decisions:

- Coping with a recent diagnosis
 - Managing a chronic illness
 - Exploring and understanding treatment options
 - Seeking medical referrals to top doctors and facilities
 - Accessing mental health or substance abuse treatment
 - Preparing for major surgery and rehabilitation
 - Arranging long-term care for a loved one
 - Navigating the healthcare system and coordinating care
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Health Insurance Concerns:

- Inadequate health insurance or a potential gap in coverage
 - Questions about health insurance plan(s)
 - Difficulties managing medical bills
 - Need for supplemental insurance plans or coverage
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Indications That a Person May Need the Support of a Health Advisor or Advocate:

Early Signs:

- Slight change in behavior
- Weight fluctuation for no apparent reason
- Complaints of insomnia or sleeping too much
- More energetic or more sullen
- Uncharacteristic concern or change in investments

Progressed Alerts:

- Obvious change in behavior or personality; acting like a different person
- Expressions of sadness, hopelessness, or despair; feeling overwhelmed; expressing suicidal thoughts
- Uncharacteristic anger, moodiness, or anxiety
- Withdrawn or isolated; not answering phone or not returning calls
- Paranoia in general or about specific people or situations
- Lack of self-care, appearing unkempt or appearing to have an unhealthy lifestyle
- Confused thinking, as evidenced in conversation

Contact Us

Is your client experiencing a health-related challenge? If they delay seeking treatment or their insurance does not align with their needs, they risk financial exposure and poor care. **Support your client's health by referring them to a health advisor.**

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