

# Advocord Founder & CEO Nancy Meyers discusses Tools Caregivers Need to Fulfill Their Fiduciary Duties

*CEOCFO Magazine interviews Advocord Founder & CEO Nancy Meyers on How they Help Caregivers and Guardians Meet Fiduciary Responsibilities*



CHAMBERSBURG, PENNSYLVANIA, UNITED STATES, February 13, 2023 /EINPresswire.com/ -- [CEOCFO Magazine](#), an independent business and investor publication that highlights important technologies and companies, today announced an interview with Nancy Meyers, Founder & CEO of [Advocord](#), a Chambersburg, PA-based life-management platform for guardians.

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Our mission is to create a person-centered record that improves the accountability and oversight for those responsible for the most vulnerable individuals.”

*Nancy Meyers*

To read the full interview visit:

<https://www.ceocfointerviews.com/advocord23.html>

In an interview with CEOCFO’s Senior Editor Lynn Fosse, when asked what is the idea behind Advocord, Nancy Meyers said, “The idea behind Advocord is that family members need to have the tools and education to be a good fiduciary for an incapacitated loved one. When

people take on the role of “caregiver” that can encompass a broad range of things. There are the caregivers that are providing hands-on daily care for the physical and medical needs. Then there are those caregivers that are fiduciaries – meaning they are legally responsible for managing finances and medical care, be it a under a court-appointed guardianship, conservatorship, or by virtue of a power of attorney.” Ms. Meyers continues, “Advocord gives those caregivers - the legally responsible ones - the tools they need to make sure they are fulfilling their fiduciary duties toward their loved ones.”

Ms. Meyers explained why what they are doing is vital for caregivers, “Even people who are well-meaning, if they do not understand the legal ramifications of what they are doing, they can end up taking on personal liability. Sometimes in the case of court appointed guardianship, they find themselves before a judge having to answer for what they have done. Lawyers have traditionally not done a very good job of educating lay guardians or lay agents under powers of attorney

about what they have to do. Unfortunately, we have a number of people who end up in court after the fact, where a little bit of education could have prevented that.”

Ms. Meyers was asked how people can engage with ADVOCORD, “We have a two-pronged approach. We have a public facing website that has a Learning Center and we are constantly in the process of building our resources. So the state where you are appointed as a guardian will have a guardianship handbook that you receive. Most of those handbooks are about 250 pages long and are not user-friendly. They are given to people who are usually pretty overwhelmed as it is. Most people that find themselves in this role are members of what we call ‘sandwich generation’ and they have kids at home and are trying to take care of an elderly parent or two. The thought of reading a 250 page manual does not sit well and it does not get read. Our first priority is to provide educational materials through our user-friendly video series. The videos are no longer than two minutes each, and cover the highlights and best practices. We work with an educational advisor as well that helps us.”

As for what they provide, Ms. Meyers shared, “The second phase is the software platform itself and that is what gives people the ability to track all the details that they need to track, have all the documents that they need to have at their disposal with them on a desktop or mobile device, and share that information when they need to. The platform is accessed from a desktop or mobile device, with all the features available on both. It allows people to quickly compile information. For example, if a guardian is meeting with a nursing home, and they are asked about the person’s income and



Nancy Meyers, Founder & CEO, Advocord



monthly expenses, the guardian can use his or her phone and actually create that report for a specific timeframe, specific category of expenses, and actually email right to the nursing home instantly. I wanted to make sure people had the tools to organize documents and details, share information, and answer questions that they are routinely asked either by the court in an annual report or by a family member."

Asked who ADVOCORD is currently reaching out to, Ms. Meyers said, "We are going to the guardianship ecosystem right now so that includes state agencies and courts. Those are our primary focus. We also do outreach to attorneys, financial advisors, banks, and anybody crossing paths with people doing this work."

Addressing the accessibility of their solution, Ms. Meyers went on to say, "We have price right now of \$4.99 a month. It is an introductory price. It is definitely a value because our platform right now is very feature-rich. It has far more than I had really expected to put out there in our first version. That being said, we also know that times are tough for a lot of people. You look at the stats of unpaid caregivers and how much of their own money they spend and how much time they spend. So many folks have to leave employment to care for a loved one and we really did not want to price it such that we could not help people. That is why we wanted it accessible."

When asked what someone may miss about ADVOCORD that should be understood, Ms. Meyers responded, "I think what really should be understood is although we designed Advocord as a compliance tool for a fiduciary, our mission is to create a person-centered record that improves the accountability and oversight for those responsible for the most vulnerable individuals."

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