

Financial Planners Address Aging Caregiving Challenges to Deepen Client Relationships

The caregiving crisis is reshaping the financial landscape for millions. Financial planners and wealth managers now help navigate aging care for clients.

OLDWICK, NJ, UNITED STATES, January 16, 2025 /EINPresswire.com/ -- The caregiving crisis is here, and it's reshaping the financial landscape for millions of families. Certified Financial Planners (CFPs) and wealth managers are now considering innovative solutions to not only navigate this growing challenge but also transform how they serve their clients by integrating caregiving solutions into financial planning, empowering advisors to become indispensable partners in their clients' lives.



How Addressing Caregiving Issues Supports Financial Planning

Caregiving costs are an invisible financial drain for families. With caregiving responsibilities often colliding with retirement planning, estate management, and wealth preservation, advisors are uniquely positioned to help clients tackle these challenges—but only if they have the right tools. To bridge that gap, CFPs and wealth managers offer resources to allow clients to navigate care-related issues as family members age in place. Financial advisors may now recommend families have access to:

Caregiving Cost Estimator: A powerful tool to integrate caregiving expenses into financial plans seamlessly.

Client Empowerment Tools: From budgeting and legal guidance to family coordination features, equipping clients with solutions they need to manage family aging care.

Advisor-First Approach: Tailored tools to help advisors anticipate caregiving impacts, strengthen client relationships, and create loyalty that lasts generations.

Empowering Advisors: An Edge Over the Competition

In a crowded and competitive market, differentiation is everything. Advisors offering these types of resources:

Stand Out: Offer a unique service that addresses caregiving—a pain point that's personal and urgent for many clients.

Build Loyalty: Clients turn to advisors who understand their whole financial picture, including caregiving.

Grow Their Practice: Attract new clients by providing a solution that no one else is offering.

Real-World Results: Impacting the Client Experience

Clients can now walk into a meeting with their financial advisor stressed about the financial strain of caring for their aging parents. Instead of offering general advice, the advisor can now show them a Caregiving Cost Estimator to outline future expenses, guide them to legal resources for estate planning, and provide tools for family coordination—all in one session.

“

Caregiving is the hidden disruptor in financial planning. Advisors can turn this into an opportunity for value to their clients, so they don't just survive caregiving—they thrive.”

*Jeannette Galvanek, CEO of
CareWise Solutions*

Client relationships deepen because they know their advisor is addressing their biggest family care challenges head-on. Financial advisors can now help clients shift caregiving from a crisis into a manageable part of financial planning, ensuring clients leave every session feeling empowered and prepared. With a personal [concierge](#) service, clients no longer juggle the workday with tasks that distract them from job responsibilities. By outsourcing these tasks, they remain focused at work and perform their life and caregiving duties with ease. The caregiving crisis is growing, and the demand for trusted advisors who

understand its impact is skyrocketing.

About [CareWise Solutions](#)

CareWise Solutions is a pioneer in addressing the intersection of caregiving and financial planning. The [Caring Place HUB](#) empowers financial advisors and their clients with innovative



Jeannette Galvanek, Founder, CareWise Solutions

tools to navigate the financial, legal, and lifestyle complexities of caregiving, ensuring a future where families and finances thrive.

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The Caring Place HUB App

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