Health Consortium
Team Members and Services

Navigating through the often complex and fragmented alternatives for health care can be emotionally and financially draining.

Knowing this reality, our consortium of health management providers are available to help serve your client's needs in an orderly and systematic manner.

Because our independent professionals work as a team, the services your clients receive are simplified and stream-lined to save both time and money, while delivering the very finest care available, tailored spe-cifically to meet their needs.

These services include:

- Private Care Management
- Conservatorship
- Trust Advisory Services
- Representative Payee Services

Our Mission

Our mission, and the mission of all of our consortium team members, is:

To provide outstanding service to our circle of individuals and families.

We are committed to:

❖ Offering a unique combination of ser-vices that allows us to achieve innovative solutions for our clients.

❖ Working with allied professionals and organizations to coordinate comprehensive and collaborative strategies for our clients.

❖ Serving our clients and their families with the highest degree of excellence, confi-dentiality and reliability.

❖ Listening and responding to our clients' ever-changing needs and helping them cope with life changes and challenges.

❖ Achieving recognition as leaders in our areas of practice through education, advocacy and community involvement.

❖ Meeting the ethical standards of our individual fields of practice.

For more information, please phone
(800) 279-8035

Benefits of Using the Health & Wealth Trust Consortium

We live in a complicated world, especially when it comes to coping with lifestyle changes.

That's why The Wealth and Health Trust Consortium was created: to help consolidate and coordinate the legal, financial and health care strategies and services needed to help clients and their families succeed.

All of our consortium team members offer the highest degree of experience and independent expertise on the local level – and are available together or individually – to ensure that you and your clients receive the most informed, efficient and cost-effective wealth and health management solutions possible.

For more information on how we can help your clients cope with their life-changing circumstances or events, please call us at: 1-800-279-8035.

The Wealth & Health Trust Consortium

A team of independent local advisors working together to help your clients and their families with total wealth and health care management solutions

These comprehensive services are available together or individually to meet the needs of your clients.

Wealth Consortium
Team Members and Services

If your clients have experienced a life-changing circumstance or event – the members of our local consortium of independent wealth management partners can help.

Not only do our providers make every effort to preserve, protect and grow your client's assets, the services offered by our team are available to help meet client needs in the most efficient and cost-effective manner.

Our team members and services include:

❖ Independent, Locally-Owned Banking Institutions

• *American National Bank*

Each of our local banking institution members offers dependable administration of trusts, including distributions to the trust beneficiary, bill paying, tax filings and detailed financial record keeping centered around each client's family needs.

❖ A Financial Planning and Investment Management Services Provider

• *Seal Financial Services, Inc.**

Highly credentialed with a 25-year track record for sound financial solutions, Seal Financial Services provides comprehensive financial guidance, and independent and conservative investment growth strategies, to your clients by understanding their special needs and goals. Services include helping people:

• Prepare comprehensive financial and investment plans to maximize financial resources.

• Evaluate and implement the use of fee-based asset management strategies to generate funds for the added costs of lifestyle changes.

• Maximize the benefits of Social Security, Medicare, Medicaid, Medicare Supplemental insurance and Long-Term Care insurance.

❖ Estate Planning Attorneys

Our local team of highly qualified attorneys is dedicated to assisting your clients with their estate and estate tax law planning needs. Our teams of attorneys specialize in:

- Comprehensive estate plans
- Preparation of:
  - Wills and Trusts
  - Powers of Attorney
  - Health Care Directives

❖ Elder Law and Disability Attorneys

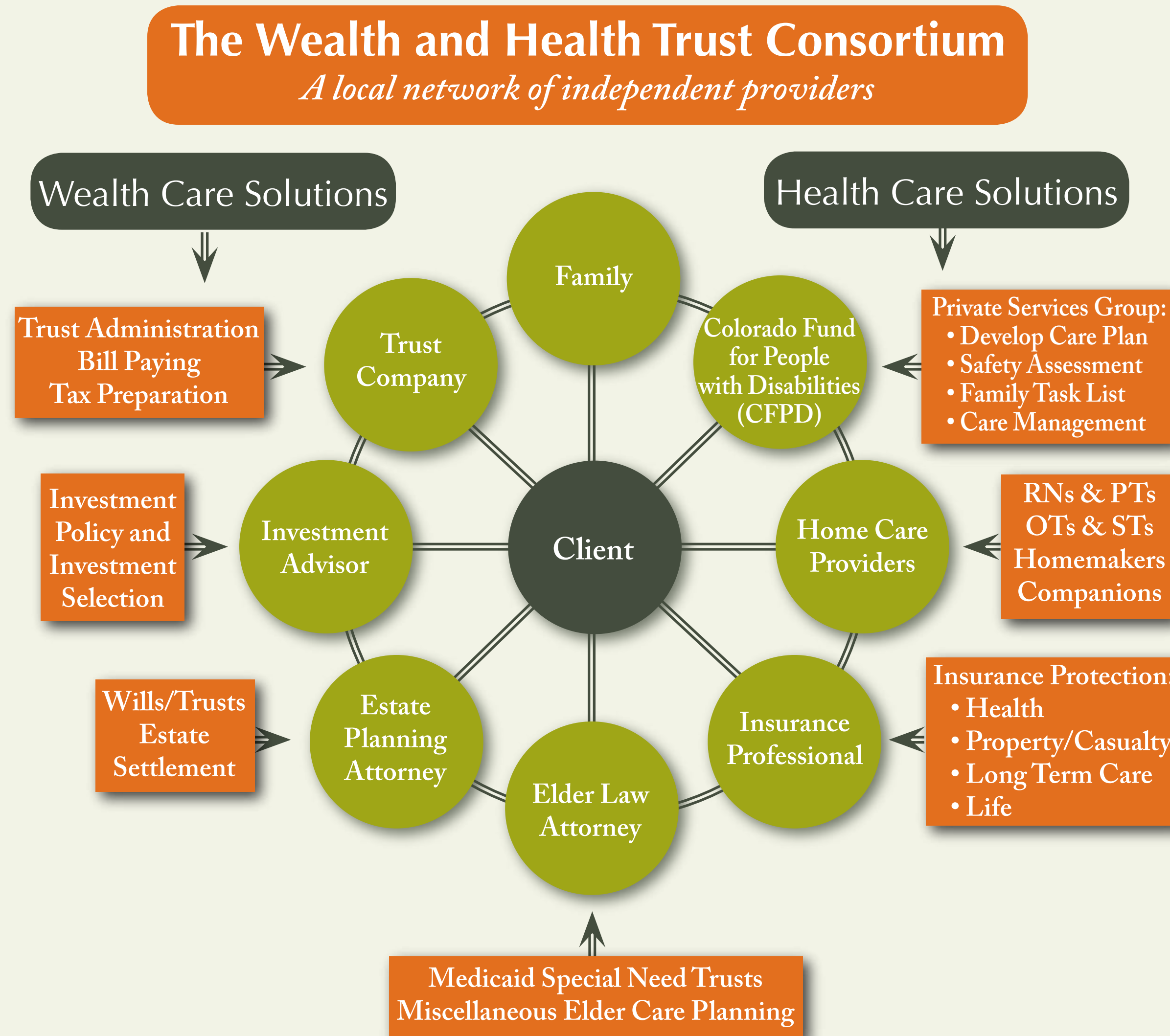
If your firm does not specialize in this area of law, our consortium also incorporates a select group of legal experts specializing in public benefit law (Medicare/Medicaid), Social Security, and Social Security Disability/Worker's Compensation. They also consult on asset protection from nursing home and other costs.

Every member of our select group of attorneys has the resources and legal expertise to help individuals receive and maintain public benefits, to include special needs trusts.

**Securities offered through Geneos Wealth Management Inc., Advisory Services offered through Seal Financial Services, Inc. All other member of the Wealth and Health Trust consortium are not affiliated with Geneos Wealth Management.*

A "total-solutions" network of local professionals dedicated to serving you and your client's needs

The Wealth and Health Trust Consortium is an interactive alliance that encompasses the entire spectrum of essential multi-disciplinary professionals – all working together to offer your clients a convenient, "total-solutions" source for all or part of their wealth and health care management needs.



The services and solutions offered by our consortium team members are available together or separately, depending on the needs of your clients.