

Elder Care Referral Packet

Continuity of care through the administrative weeks that follow a client's death. Holding Ground takes on estate paperwork, account closures, and institutional follow-through—so your practice can honor the family relationship without expanding clinical scope.

CO-BRANDING

Your Practice / Firm / Funeral Home Logo Here

Request a co-branded version at support@weholdground.com

Who We Are

Holding Ground is a bonded, insured operational coordination practice that begins where elder care ends—the administrative aftermath of a client's death. We do not provide clinical services or compete with your aftercare offerings. We exist to give your care managers a vetted, structured place to point families when grief meets logistics.

Why This Packet Exists

This document is built to live in your aging life care & care coordinators workflow. It explains who Holding Ground is, what we do (and don't do), how a referral works, and how families experience the handoff. Use it internally, share it with colleagues, or hand it directly to a family. Co-branded versions are available on request.

What Holding Ground Handles — And What We Don't.

WHAT WE HANDLE

- Notifications to Social Security, pensions, and benefit administrators
- Bank, brokerage, and credit account closures
- Subscription, utility, and recurring service cancellations
- Insurance claim coordination
- Asset and liability inventory and document organization
- Coordination with the family's attorney, accountant, and financial advisor
- Weekly executor communication and final completion report
- Discreet handoff back to your practice when relevant

WHAT WE DO NOT HANDLE

- Clinical or medical care coordination of any kind
- Grief counseling or psychological support
- Legal advice or court filings
- Tax preparation or financial planning
- Anything that competes with or duplicates your aftercare services

Problems We Reduce For Your Practice

OPERATIONAL RELIEF

- Administrative requests outside your clinical scope
- Care managers absorbing logistical coordination they aren't staffed for
- Pressure to recommend attorneys, form services, or estate helpers informally
- Family overwhelm in the 24–72 hours after a client's death
- Loss of relationship continuity when families disappear into estate chaos
- Documentation gaps when the practice can't formally close out the file

We are administrators, not attorneys, accountants, or fiduciaries. The professional decisions stay with you. We operate under written confidentiality protocols and a fixed scope-of-work that explicitly preserves your relationship with the family.

A Predictable Handoff—For You And The Family.

<p>01</p> <p>Intake</p> <p>Your care manager introduces Holding Ground. The family reaches out on their own timeline.</p>	<p>02</p> <p>Triage</p> <p>Within 48 hours we assess the situation and confirm scope, often within 24–72 hours of the death.</p>	<p>03</p> <p>Coordination</p> <p>We take on notifications, closures, and document gathering—coordinating with the family's other professionals.</p>	<p>04</p> <p>Tracking</p> <p>Families receive weekly progress updates. Your care manager can request a status summary at any time.</p>	<p>05</p> <p>Resolution</p> <p>Final completion report and a discreet relationship close-out so your file documentation remains complete.</p>
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Trust & Standards

TRUST INDICATORS

- Bonded and liability-insured coordinators
- Written confidentiality and non-solicitation protocols
- HIPAA-aware information handling
- No commission, kickback, or referral fee arrangements
- Care-manager-only contact line for partner questions
- Warm-handoff materials your team can hand families directly

Fees & Engagement

Holding Ground engagements are fixed-fee and paid by the family or estate, scoped at intake. The care management practice is never invoiced. There are no referral fees in either direction—the partnership is built on shared standards of care and continuity.

Collaboration Models & Family Scripts.

Warm-Handoff Card Program

Care managers carry Holding Ground partner cards to introduce when families approach administrative overwhelm. We follow up only when families initiate contact.

End-Of-Care Transition Partner

Holding Ground is named in your end-of-life and post-death transition workflow as the operational continuity partner.

Preferred Provider Listing

Holding Ground appears in your client resource materials alongside attorneys, hospice partners, and other vetted professionals.

Sample Family Introduction Scripts

“After someone passes, families often face weeks of administrative work—closing accounts, notifying agencies, organizing documents. That sits outside our clinical scope, but we’ve vetted a coordination practice called Holding Ground that handles it specifically. They’re bonded and insured, they don’t compete with anything we do, and they’ll coordinate with your attorney as needed.”

“If you’d like, I can hand you their card or make the introduction directly. They follow up on your timeline—there’s no pressure and no marketing.”

Common Questions From Partners

Will you provide clinical or grief support?

No. We are administrative coordinators only. We refer families back to your practice or other clinicians for any clinical or emotional support need.

How do you protect family information?

Encrypted systems, role-based access, signed coordinator confidentiality agreements, and HIPAA-aware handling of any sensitive material.

Can you work with families outside our service area?

Yes. Our coordination is administrative and largely remote, and we support families globally.

What if the family already has an attorney or financial advisor?

We coordinate directly with them. Our presence makes their work easier, not redundant.

Start A Partnership Conversation

support@weholdground.com · 705-955-1977 · weholdground.com/partners