



Quick Referral Partner Guide

FOR CARE MANAGERS & CARE PROFESSIONALS

AADMM-accredited daily money management and financial caregiving services supporting care professionals and the clients they serve.



ASSURANCE
Family Partners

How AFP Helps

IDEAL CLIENT PROFILES & REFERRAL INDICATORS

When to Consider Referring AFP

Introduce Assurance Family Partners when a client is experiencing:

- Financial disorganization affecting care decisions
- Missed bills, paperwork, or follow-through
- Cognitive decline impacting financial management
- No clear person managing day-to-day finances
- Family tension or confusion around financial responsibilities
- Increased vulnerability to fraud or financial risk

How AFP Helps

AFP provides structured, day-to-day financial oversight so care professionals can focus on care—not financial administration. We support clients by:

- Managing bill payment and financial organization
- Maintaining accurate records and documentation
- Monitoring for unusual or high-risk activity
- Coordinating with the client's professional team

→ Clients remain in control → We work alongside you — not in place of you

How to Refer (Takes Less Than 2 Minutes)



**Option 1:
Warm Introduction
(Recommended)**

Send an email introducing AFP to your client.



**Option 2:
Direct Referral**

With client consent, provide contact details and we will initiate communication.



**Option 3: Client-
Initiated Contact**

Share our information and invite the client to reach out directly.

How to Refer a Client

A SIMPLE, PROFESSIONAL PROCESS

Copy + Paste Email Script (Use This)

Subject: Additional Support for Financial Organization

Hi [Client Name],

As part of ensuring you have the right support in place, I'd like to introduce you to Assurance Family Partners.

They specialize in daily money management and financial organization, helping individuals who would benefit from consistent oversight and structure.

They work collaboratively with care professionals and focus on bill payment, financial organization, documentation, and coordination across the client's professional team.

I believe this could help simplify your day-to-day financial responsibilities and provide added stability and peace of mind.

I'm connecting you here so you can learn more and determine whether it feels like a good fit.

Best,

[Your Name]

What to Say in Conversation (Quick Talking Points)

- "This isn't about taking control away – it's about adding structure."
- "They focus on day-to-day financial organization."
- "They work alongside professionals, not in place of them."
- "They're methodical, confidential, and accredited."

What Happens Next

- Referral is acknowledged promptly
- Client is contacted to complete intake and schedule an intro conversation
- Scope and next steps are clearly outlined
- Communication stays within professional boundaries

Response time: typically within 24 hrs

Why Partner With AFP

A REFERRAL RELATIONSHIP BUILT ON PROFESSIONAL STANDARDS

Why Care Managers Refer AFP

- Reduces out-of-scope financial responsibilities
- Protects client safety and independence
- Improves coordination across the care team
- Brings structure to complex situations
- Maintains clear professional boundaries

Professional Standards

- **AADMM-accredited** Daily Money Management firm
- Professional liability insured
- Background-checked
- Strict confidentiality and documentation standards

 (617) 733-9926

 <https://assurancefamilypartners.com/contact-us/>

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Need to Talk Through a Situation First? We're happy to discuss a client confidentially before you make a referral.



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