

The Wealth Care Partnership

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Based in Fordingbridge, The Wealth Care Partnership are Independent Care Fees Specialists (ICFS) providing support, guidance and financial advice to the elderly paying for long term care although usually advise their families or power of attorney.



Perhaps the most significant technological development has been Care2Plan which launched in August 2010. This is a stand alone online tool generating a Personal Options Report from the comfort of the user's home. This unique and innovative product appeals to those who use the internet as a method of educating themselves and to organisations such as Local Authorities, the NHS, doctors, charities, etc.

An online contact management system (Highrise) is used to manage the client database. All guide requests from the website are downloaded automatically into Highrise. Guides are sent and the case is allocated to an adviser to follow up. All information about the enquiry is held in Highrise including telephone



calls/emails/new information. All staff and advisers are trained on the use of the systems and monthly training meetings take place in the offices for Continuous Professional Development and system uses.

Other online developments include Google pay-per-click campaigns advertising the free annual Guide to Care Fees Planning, a Care Fees

Calculator on the website enabling people to work out their shortfall in income and a "Livechat" on the 'Paying for Care' Website identifying those who require their advice.



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