

# Triad SRAlliance Referral Form

## Contact Information

Name \_\_\_\_\_ Age \_\_\_\_\_ Married/Partner \_\_\_ Divorced \_\_\_ Widow \_\_\_ Single \_\_\_  
Need information or help with: Self \_\_\_ Spouse/Partner \_\_\_ Parent \_\_\_ Friend \_\_\_ City \_\_\_\_\_  
Home # \_\_\_\_\_ Work # \_\_\_\_\_ Best time to call \_\_\_\_\_ am pm  
E-mail \_\_\_\_\_ Would you like to be added to our e-mail list? yes no

## Caregiver Information

Are you currently providing care for a loved one or friend? yes no (If you answer “no”, then skip to the next section)  
Who? Spouse/Partner Mom Dad Mother-in-law Father-in-law Friend Other Relative \_\_\_\_\_  
First Name of person \_\_\_\_\_ Where do they live? \_\_\_\_\_ How long have they needed care? \_\_\_\_\_  
First Name of person \_\_\_\_\_ Where do they live? \_\_\_\_\_ How long have they needed care? \_\_\_\_\_  
Are you the primary caregiver? yes no If you answer “no”, then explain your role. \_\_\_\_\_

*I would like to be contacted on the following: (circle and prioritize so that we may be of better service)*

- \_\_\_ **Long-Term Care Planning** - have coverage/need review want to look at LTC insurance going on claim
- \_\_\_ **Medicare and Medicare Supplements** - turning 65 soon coming off of group coverage want to explore other options
- \_\_\_ **Medicare Prescription Drug Plans** - need Rx drug plan current plan doesn't cover all my drugs can't afford new Rx
- \_\_\_ **Accounting or Tax Services** - need help filing my taxes need help organizing and paying bills
- \_\_\_ **Computer Training** - need help buying a computer having issues with computer want learn how to use a computer
- \_\_\_ **Durable Medical Equipment** - hospital bed wheelchair walker oxygen not sure what we need
- \_\_\_ **Medical Alert System** - need medical alert system need home security system
- \_\_\_ **Elder Coach** - need help communicating with siblings/family members
- \_\_\_ **Elder Law Services** - need help applying for Medicaid need help with elder abuse need help with other legal issue
- \_\_\_ **Estate Law Services** - need to update Will need Healthcare Power of Attorney need Estate Planning
- \_\_\_ **Real Estate Specialist** - want to “rightsize” need to buy/sell primary residence sell residential or commercial property
- \_\_\_ **Relocation Specialist** - need help packing and moving need to have an Estate Sale need to rent storage space
- \_\_\_ **Mortgage Specialist** - need to refinance my house want to look at reverse mortgage for income or pay for care
- \_\_\_ **Home Modifications** - need to make home improvements / wheelchair accessible household cleaning
- \_\_\_ **Home Health Care Services** - need skilled care after surgery/injury need assistance or break for primary caregiver
- \_\_\_ **Senior Living Specialist** - need help finding a nursing home or assisted living facility needing more levels of care
- \_\_\_ **Financial and Insurance Services** - need an investment/insurance advisor need to review investments or insurance
- \_\_\_ **End-of-Life Services** - need hospice need help making funeral arrangements need grief counseling
- \_\_\_ **Vacation Planner** - want to plan a group tour want to plan a group cruise need help planning a vacation

# What is Triad SRAlliance?

Triad SRAlliance is a organization with trusted, caring professionals providing solutions for seniors and those who care about them. Our mission is to be a complete source of ethical, competent and trusted solutions for seniors with a respected reputation in the community for senior services.

Senior Americans face serious issues that are growing in complexity -- insurance, financial security, housing, health, legal, social. The problem is most professionals are qualified to help in only one or two areas. We are professionals focused on finding options to solve problems in the many areas that impact senior life.

Please take a moment to read through the services that we provide and fill out the reverse side, if you would like help with any of the areas of interest.

## How can we help you?

### Long-Term Care and Medicare

- **Long-Term Care Insurance** - How would you or a family member pay for long-term care?
- **Medicare Supplements** - Is someone you know already enrolled in Medicare or turning 65 soon?
- **Medicare Advantage Plans** - Do you need to review your coverage?
- **Medicare Prescription Drug Plans** - Does the current drug plan cover new prescriptions? Generics?

### Legal and Financial

- **Accounting and Tax Services** - Do you or a family member need help filing taxes?
- **Financial and Insurance Services** - Do you need to review insurance policies or investments?
- **Estate Law Services** - When was the last time a Will or Health Care Power of Attorney was updated?

### Caregiving

- **Medical Alert Systems** - Worried about Mom or Dad living alone?
- **Durable Medical Equipment** - Does someone need oxygen or medical equipment delivered to their home?
- **Elder Coach** - Are you taking care of a parent and have siblings who live out of the area?
- **Elder Law Services** - Need help applying for Medicaid or protecting assets? Planning ahead is essential.
- **Home Health Care Services** - Do you need help caring for a family member at home?
- **End-of-Life Services** - Are you in need of Hospice, or need to make funeral arrangements for a loved one?

### Housing and Real Estate

- **Home Modification** - Do you need to make modifications or improvements to be able to take care of a loved one?
- **Senior Living Lifestyle Options** - Are you looking for an independent living or assisted living facility?
- **Mortgage Specialist** - Are you looking to refinance or use a reverse mortgage to provide income?
- **Real Estate Specialist** - Are you "rightsizing," or considering moving a parent into a facility?
- **Relocation Specialist** - Need help moving a parent into a facility?

### Other Senior Services

- **Computer Specialist** - Need help buying, setting up, upgrading or learning more about computers?
- **Vacation Planner** - Need a break from your caregiving duties or want help planning a cruise or vacation?