

LifeCare Gateway has been warmly embraced by the financial services industry as an innovative tool that addresses a top threat to retirees' financial future. We help advisors tackle clients' financial and emotional risks associated with caring for parents and loved ones. Our turnkey practice management solution generates new revenue and product sales for advisors by engaging clients and their extended families.

Industry Perspectives on LifeCare Gateway

Here is what is being said about us:

“proactively address these issues and become a valued resource to clients”

“Clients routinely call me with concerns about their parents' health and their ability to pay for needed care. LifeCare Gateway enables me to be proactively address these issues and become a valued resource to clients. By incorporating life care planning in the financial planning process, I can head-off issues before they become problems. I can also help clients anticipate concerns at a time when everyone is healthy and family dynamics are not ignited.”

Michael Hartzman, CFP®, President, Bristol Financial Services

“new business opportunities LCG presents”

“I'm excited about the new business opportunities LifeCare Gateway presents. It gives me a sound platform to reach out to prospects and form strategic alliances with community organizations serving clients with life care needs. For example, we've now teamed up with Project Lifesaver, a fast growing national organization that protects wandering patients (primarily Alzheimer's and Autism sufferers). Dominion Investment Group now provides families of those patients with resources to address some of their concerns. It's a great lead generator that also provides a value-added service to the community.”

Daryl Bank, Managing Partner, Dominion Investment Group

“advisors navigate the life planning issues”

“We became the industry's leading financial planning tool by spotting trends and developing innovative solutions that help our 7,000 advisors address client needs. A trend that we've had a close eye on is the increasing number of clients who are impacted by elder care and life planning issues. We've integrated LifeCare Gateway into our platform to help our advisors navigate the life planning issues that come their way.”

Edmond Walters, Founder and CEO, eMoney Advisor

“serve clients more holistically by addressing both the health and wealth objectives”

“LifeCare Gateway enables broker-dealers and advisors to serve clients more holistically by addressing both the health and wealth objectives within the retirement phase of financial planning.”

Pershing Corresponding View, March 2009

“LCG allows me to provide this service much more efficiently.”

“I immediately saw the validity in LifeCare Gateway's offer. In my 30 plus years in this business, I've helped countless families deal with life care issues. I've done everything from visiting nursing homes to interviewing at-home health care providers. Clients need help in making care decisions, but it isn't the best use of my time. LifeCare Gateway allows me to provide this service much more efficiently.”

Fraj Lazreg, New York Region Manager of Money Concepts