

Care-Related Risk:

The Missing Layer in Financial Planning

Advisor Preview

2026



Even **well-structured financial plans** can be destabilized by sudden care decisions.

Not due to market performance but due to:

1. Many **uncoordinated** medical decisions
2. Lack of legal **clarity**
3. Family **misalignment**
4. Disorganized access to critical information
5. Reactive, **time-sensitive** decision-making

Most financial plans account for assets, but not the care systems that protect them during life transitions.

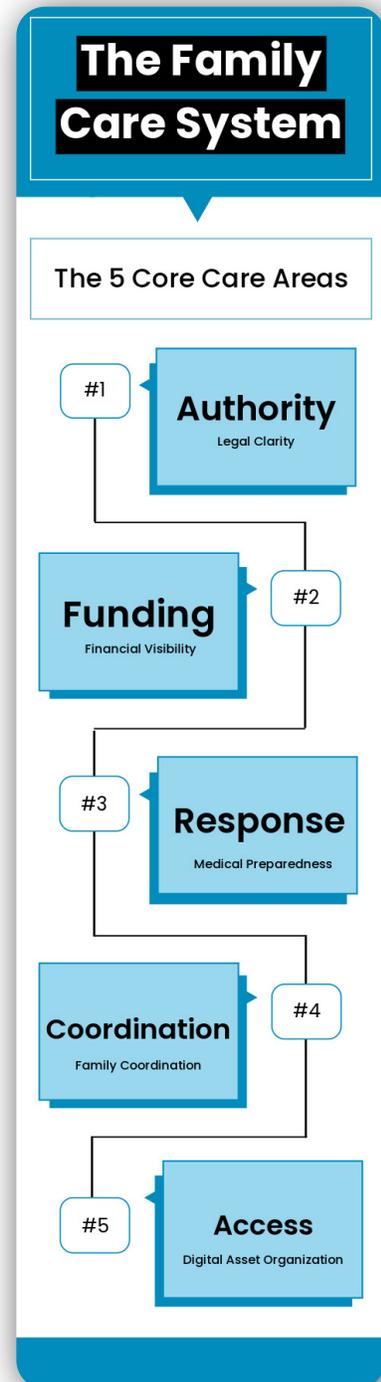


The Care Risk Assessment Framework

A structured diagnostic tool that identifies vulnerabilities that can impact financial stability during care transitions.

What the Assessment Produces?

- Exposure profile
- Risk categorization (Stable / Vulnerable / High Risk)
- Structured next-step guidance



How Advisors Use This Framework?

1. Preventative Planning Layer

Used with clients navigating aging parent dynamics.

2. Crisis Stabilization Tool

Introduced when a care event begins impacting decision-making or liquidity.

3. Client Experience Differentiator

Positions the advisor as proactive in protecting both wealth and family systems.

This is not financial advice. It is a risk assessment framework families use alongside their financial and legal professionals.



Ready to take the next step?

Request a **Preview Assessment** or
Schedule a 15-Minute Conversation
by emailing us: **contact@tecbutler.com**



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