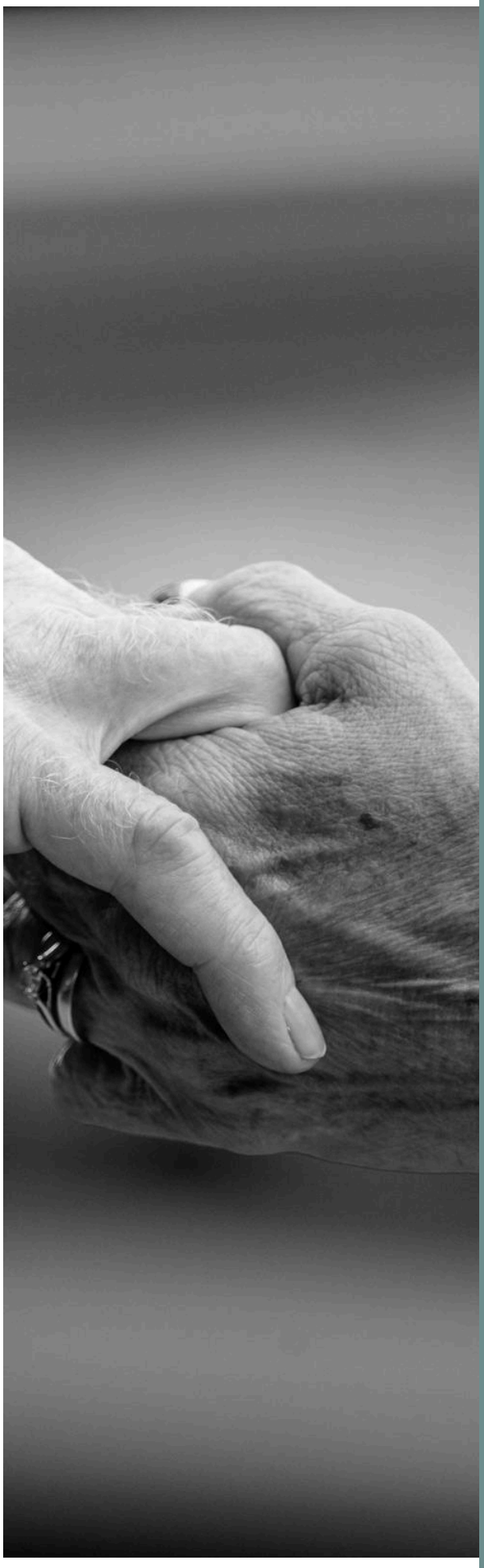


ELDER LAW

REFERRAL PACKET

UNICITY

CARE MANAGEMENT

EXECUTIVE OVERVIEW

Unicity Care Management provides structured clinical oversight and capacity risk monitoring for medically and cognitively vulnerable adults involved in active legal matters. Elder law cases are frequently disrupted by medical events, cognitive decline, and unstable care environments.

These disruptions can delay filings, complicate guardianship proceedings, and destabilize Medicaid planning timelines.

WE PARTNER WITH ELDER LAW ATTORNEYS IN CASES INVOLVING:

- Contested guardianship proceedings
- Contested Power of Attorney disputes
- Capacity-sensitive estate planning
- High-asset and crisis Medicaid planning
- Complex long-term care transitions
- A client's capacity is uncertain or declining
- Family conflict is impacting care decisions
- A client is medically unstable or at risk of hospitalization
- The living environment creates safety or neglect concerns

Our role is to stabilize medically and environmentally volatile situations that may compromise legal strategy. Through disciplined oversight and ongoing monitoring, we reduce crisis-driven disruption and protect the integrity of planning decisions.

For more than 10 years, our multidisciplinary teams of Registered Nurses and Licensed Social Workers have managed complex clinical and psychosocial cases across New Jersey and South Florida, guiding families through high-conflict and high-risk transitions with structure and accountability.

ATTORNEY VALUE SUMMARY

WHY ELDER LAW ATTORNEYS ENGAGE UNICITY CARE MANAGEMENT

Unicity Care Management serves as a clinical risk-control partner in legally sensitive matters involving aging, incapacity, and complex care needs. Our role extends beyond care coordination. We provide structured clinical insight that strengthens legal strategy and protects client interests in high-stakes environments.

Our involvement enhances case stability by identifying and proactively addressing medical, cognitive, and environmental risks that may disrupt legal plans or expose clients to harm. We bring clarity to evolving situations and ensure attorneys have timely, objective information when navigating guardianship, estate disputes, long-term care planning, and capacity-related concerns.

By increasing visibility into changing health conditions, family dynamics, and care compliance, we help attorneys anticipate challenges before they escalate into crises or complications. This level of insight supports more strategic and informed decision-making.

Our documentation and clinical perspective also support defensible decision-making. We provide detailed assessments, care plans, and ongoing reports that can withstand scrutiny in contested matters, helping to substantiate capacity determinations, level-of-care needs, and risk mitigation efforts.

In capacity-driven and adversarial environments, Unicity acts as a neutral, clinically grounded resource that bridges the gap between legal objectives and real-world care realities. The result is stronger case positioning, reduced liability exposure, and improved outcomes for vulnerable clients.

ATTORNEY VALUE SUMMARY

1 CAPACITY RISK MONITORING

- Ongoing observation of cognitive and functional indicators
- Documentation of observable condition changes
- Identification of emerging decline affecting autonomy
- Structured reporting aligned with active legal strategy

This provides attorneys with clearer insight when advising on guardianship, contested POA disputes, and estate planning involving questionable capacity.

2 STABILIZATION DURING LITIGATION OR DISPUTE

- Oversight in high-conflict family dynamics
- Neutral coordination of communication among stakeholders
- Monitoring of care environments for safety and neglect risk
- Reduction of volatility during active proceedings

In contested matters, we provide measured oversight that reduces instability and supports planning defensibility.

ATTORNEY VALUE SUMMARY

3 MEDICAID AND ASSET PROTECTION ALIGNMENT

- Monitoring during spend-down and eligibility-sensitive periods
- Coordination of placement transitions
- Oversight to prevent medical events that disrupt timing
- Structured communication during long-term care conversion

Our involvement supports continuity and controlled execution in high-asset and crisis Medicaid planning.

4 CRISIS PREVENTION AND CASE CONTINUITY

- Monitoring vulnerable clients living independently
- Reducing preventable hospitalizations and readmissions
- Early identification of environmental or safety concerns
- Structured escalation protocol for urgent changes

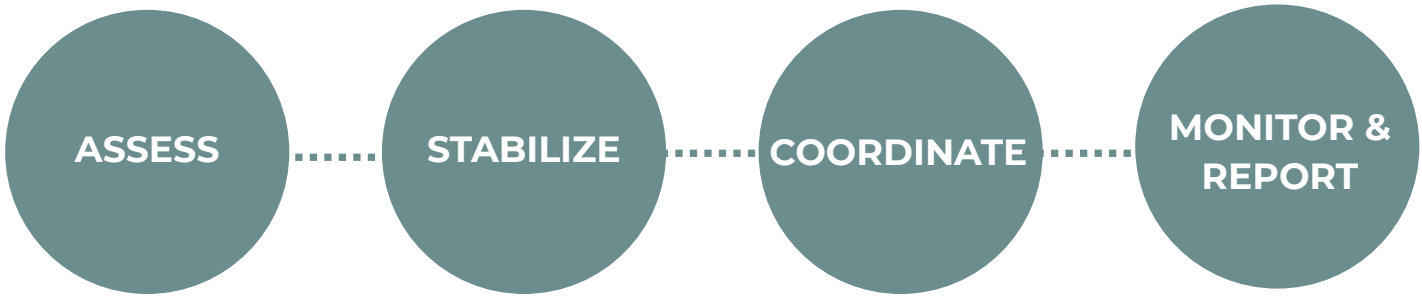
Fewer emergency events mean fewer reactive filings, fewer destabilizing disruptions, and greater strategic control.

OBJECTIVE

To provide disciplined clinical oversight that reinforces the integrity of your legal strategy, reduces case volatility, and protects vulnerable clients during complex proceedings.

THE UNICITY STABILIZATION FRAMEWORK

This framework promotes continuity, accountability, and reduced volatility throughout guardianship proceedings, Medicaid planning, and complex legal transitions.



Comprehensive evaluation of medical condition, cognitive status, environmental safety, and support systems.

Immediate coordination to address urgent medical, safety, placement, or family conflict concerns.

Structured oversight of providers, medications, appointments, and interdisciplinary communication.

Ongoing evaluation of condition stability, cognitive shifts, and environmental risk with defined communication cadence and documented updates.

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RISK MITIGATION & PROFESSIONAL ALIGNMENT

1. Monitoring high-risk clients living independently
2. Identifying early signs of cognitive decline affecting capacity
3. Reducing preventable hospitalizations that disrupt strategy
4. Supporting appropriate transitions to assisted living, memory care, or skilled nursing
5. Providing structured oversight during contested guardianship and POA dispute
6. Maintaining documented awareness of evolving care environments

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WHEN TO ENGAGE UNICITY CARE MANAGEMENT

IMMEDIATE TRIGGERS

- Client shows signs of cognitive inconsistency during meetings
- Family conflict is escalating and interfering with decisions
- Hospitalization or rapid decline disrupts legal timelines
- Concerns about undue influence or unsafe living conditions

STRATEGIC USE CASES

- Pre-guardianship documentation and stabilization
- Medicaid planning where timing is critical
- High-asset cases requiring continuity and risk control
- Complex discharge or placement transitions

WHAT HAPPENS IF YOU DON'T

- Delayed filings due to instability
- Increased litigation risk from poor documentation
- Loss of control over planning timelines
- Exposure to disputes around capacity and influence

.

REFERRAL & COMMUNICATION PROTOCOL

REFERRAL INITIATION
Direct phone contact or secure intake communication.

RESPONSE STANDARD
Client or responsible party contacted within 24 hours.

ASSESSMENT TIMELINE
Comprehensive evaluation scheduled promptly based on urgency and case complexity.

DOCUMENTATION
Structured care plan developed following assessment. Updates provided in alignment with attorney direction and applicable permissions.

ESCALATION PROTOCOL
Immediate notification of significant medical events, observable cognitive decline, safety threats, or environmental instability affecting legal planning.

We operate as a clinically aligned extension of your professional team while maintaining defined scope and professional boundaries.

OUR TEAM



GREGORY BRUN

CHIEF EXECUTIVE OFFICER



MARY DIDIA

MANAGING DIRECTOR



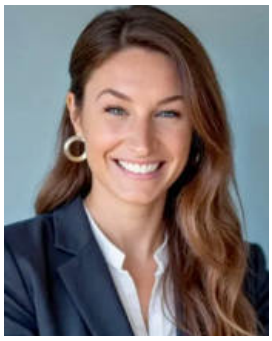
ANDRE MARQUES

DIRECTOR OF FINANCE & ADMIN



RITA GRANDELIS

DIRECTOR OF CARE MANAGEMENT



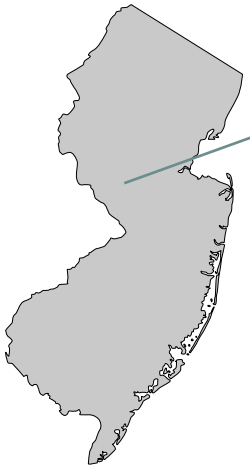
CATHLEEN KEATING

ASSISTANT DIRECTOR OF CARE MANAGEMENT

UNICITY

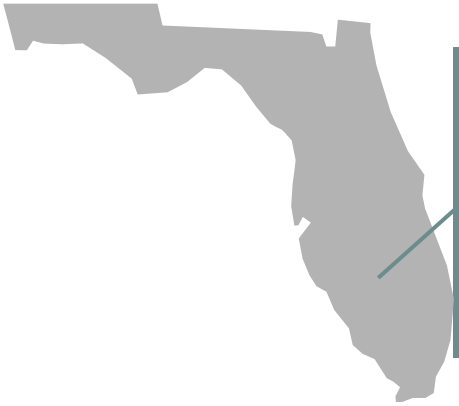
CARE MANAGEMENT

LOCATIONS



SERVICING

BERGEN, PASSAIC, ESSEX, MORRIS, SOMERSET, UNION & HUDSON COUNTIES



SERVICING

PALM BEACH & BROWARD COUNTIES



SERVICING

ROCKLAND COUNTRY

UNICITY

CARE MANAGEMENT

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