Work With Us in 6 Steps

When we agree to serve a client in a fiduciary or healthcare management role, or both, we do not take lightly that they entrust us with tremendous responsibility. However, we believe that successful service is driven by knowing the person being served. Therefore, our mission of top-quality, person-centered service begins with our comprehensive intake process.

Guidance Carolina

Providing person-centered financial and healthcare decision-making support since 1979.

Thank you for your interest and consideration of Guidance Carolina. We are honored to serve as a resource for those in need of financial and/or healthcare decision-making support—either now or in the future.

Follow us on Facebook for the latest Guidance Carolina happenings.

For more information and to begin the intake process, please contact:

Mary Marshall
Client Intake Coordinator
Mary@GuidanceCarolina.org
336.273.5389 Ext. 106
www.GuidanceCarolina.org

Visit www.GuidanceCarolina.org for more information

1 Contact Us!

If you are interested in Guidance Carolina's services, we ask that you reach out to us before nominating Guidance Carolina in a legal role so we can learn more about the situation. If we feel that Guidance Carolina may be able to assist after the initial conversation, we will move forward with the next step.

2 Meet Prospective Client

Guidance Carolina meets with the client and/or their representative for an intake meeting (in-person or remotely). Our staff will share information about our services, answer questions, and gain a better understanding from your perspective.

3 Complete Client Intake Form

If both the client and Guidance Carolina agree to move forward, we ask that the client (or representative, if appropriate) complete our Client Intake Forms and return them to us by secure portal link, email, mail, or fax.

4 Review Legal Documents

Once the legal documents are drafted, we ask that your attorney forward a copy to Guidance Carolina BEFORE the documents are signed. Our legal counsel will review the drafts to ensure Guidance Carolina can fulfill the document's terms and will work directly with your attorney if there are any questions or recommendations.

5 Client File Is Open

Once Guidance Carolina approves the legal documents, they are ready to be signed. The attorney should provide Guidance Carolina copies of the final, signed documents. The documents and the completed Client Intake Forms are required to officially open a client file. At this time, the client or their legal financial representative will receive an invoice.

6 We Are Ready to Serve!

If named in an ACTIVE role (i.e., the client needs financial and/or healthcare decision-making support immediately), we will begin providing financial and/or care management services.

If named in a FUTURE role, we are on "standby" until the client needs us. A welcome packet is mailed to all future clients with an invoice for our activation fee and legal document review. Care Management services can be provided as needed.