Case Study: How bQuest Helped an UHNW Advisory Firm Transform Aging-Care Support into a Core Pillar of Holistic Wealth Management

For **Michael Mittman**, Co-Founder of **West Avenue Private Wealth**, the shift from a Wall Street firm to an independent UHNW-focused RIA was rooted in a simple realization that true client advocacy requires freedom. After spending more than a decade in a large corporate environment, where innovative planning ideas and specialized client needs were often constrained, Mittman knew he needed a different path.

“In independence, I finally had the ability to act in my clients’ best interests,” he said. “And I wanted the freedom to bring clients resources that genuinely improved their lives.” Eighteen months later, West Avenue Private Wealth is a thriving UHNW firm and one of the most meaningful evolutions of its service model came from an unexpected place: longevity planning and aging-care coordination.

While building West Avenue Private Wealth, Mittman began connecting with innovative professionals in adjacent client-support fields. A chance conversation with a care-transition specialist opened his eyes to the profound, unmet need families face around aging, caregiving, end-of-life preparation, and after-loss support. “I realized quickly that every single one of my clients knows someone, such as a spouse, parent, sibling, neighbor, that is going through some stage of aging or loss,” he said. “These issues come up constantly. I just didn’t have the tools to help.”

Before discovering bQuest, Mittman avoided these conversations, not because he didn’t care, but because he lacked a vetted network of service providers, clear workflows, or a way to support clients without overstepping expertise. As the most trusted advisor to UHNW families, that gap didn’t sit right.

When Mittman learned about **bQuest's Longevity Planning and Aging Care Coordination** with its curated professional network, it immediately clicked. "As soon as I understood what bQuest was solving for, I thought that this is exactly what my clients need," he said.

bQuest's recently launched **Care Concierge Service**, a high-touch, white-glove offering that pairs client with professional care experts, further expanded that capability. bQuest's Care Concierge service provides advisors with a structured, expert-backed solution for families navigating care transitions, aging-in-place questions, sudden health events, or end-of-life scenarios. The model enables advisors to stay involved without becoming care coordinators themselves, offering reassurance, clarity, and trusted support to clients during some of life's hardest moments.

Mittman's first direct use of bQuest came during a challenging period when two clients passed away in the same month, and both families needed support managing their mothers' affairs. With bQuest's Care Concierge handling logistics, resources, referrals, and emotional hand-holding, Mittman was able to provide meaningful guidance during a time of grief.

"This was wealth management that had nothing to do with money," he reflected. "I wasn't paid for it. And it was the best feeling I've had in this business." The experience changed how he now approaches client reviews. bQuest is a key item on West Avenue Private Wealth's annual-review agenda, and clients increasingly request Concierge support for both crisis situations and proactive planning.

One UHNW client that was caring for elderly parents in her home had an immediate reduction in stress during a live Concierge call. "I could actually feel the stress coming down as we spoke," Mittman said. "She finally had a resource and a partner, which reflected incredibly well on us."

Another client used bQuest to help a healthy, active parent think about long-term aging and social engagement. The Care Concierge gently facilitated discussions the family had been avoiding, helping them explore options without pressure. “It reshaped the entire family dynamic,” he said. “That’s the kind of value we could never deliver alone.”

For Mittman, bQuest represents a natural progression of what modern wealth managers must deliver. “In our world, advisory services are expanding. We’re no longer just investment managers, we’re advising on taxes, estate planning, family businesses, next-gen education, and aging. This is where the industry is going.”

Most firms can’t build or vet an entire national network of aging-care professionals at the depth, breadth, or quality UHNW families require. According to Mittman, that leaves two choices: do nothing, or partner with specialists like bQuest whose expertise becomes an extension of the advisor’s value.

Choosing bQuest has already deepened client loyalty and established West Avenue Private Wealth as a truly holistic advisory firm. “When you show up for clients during the worst moments of their lives and help remove stress, they will never leave you because of short-term market performance,” Mittman said. “This is the future of wealth management.”

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