

Case Study: How Halbert Hargrove Aims to Build Deeper Client Trust by Solving the Care Coordination Problem



For Nick Strain, CFP®, CPWA®, AIF®, Senior Wealth Advisor and Chair of Wealth Advisory at Halbert Hargrove, a \$4.2 billion+ independent RIA (as of 12/31/25), the need for structured aging care planning became clear after years of watching clients and their families navigate medical crises without a roadmap. **Clients are living longer, and their adult children are increasingly scattered across the country, making it harder for families to coordinate care in the moment it is needed most.**

One client's experience crystallized the issue. A woman in her mid-80s lost her husband a few years ago, then suffered a stroke that required round-the-clock care for six months. Her stepson stepped in to help, but the family suddenly found itself coordinating schedules and paying for five or six caregivers without any centralized support. "Our investment account is not meant to be a payroll service," Strain said. Checks meant for caregivers were getting lost in the mail, and the family had no vetted resource to turn to.

Stories like this had become increasingly common across the firm, highlighting the need for a more consistent approach to supporting clients through aging care decisions. While advisors often leveraged trusted professional relationships and local resources to assist families, finding qualified care providers in unfamiliar markets required research and coordination. "I would need to call a care professional that I have worked with in the past and ask if they knew of care professionals in a certain city and start networking and vetting care providers, which is time-consuming and difficult," Strain said.

As a result, Halbert Hargrove's Wealth Advisory Committee, which Strain has led since 2012 and is responsible for evaluating the financial planning services the firm offers, conducted detailed due diligence to evaluate solutions, ultimately identifying bQuest as the core platform to support their approach.

After meeting the bQuest team, the Wealth Advisory Committee fielded detailed questions about bQuest's vetting process for care providers, their national reach, and their approach to service and technology. The committee also checked references and reviewed the platform directly. ***"bQuest's platform was much more in-depth than any research of care professionals that we could conduct on our own,"*** Strain said.

Two services in particular stood out as the reasons the firm chose bQuest: in-home care and assisted living placement. Strain said those are the needs advisors hear about most often from clients and families, and also the hardest to source well, particularly assisted living placement, where structures and agreements between agents and facilities can vary widely and are difficult for an outside advisor to evaluate.

The Wealth Advisory Committee opted to roll bQuest out firm-wide once its vetting process was complete, reasoning that client care situations can arise at any time in any single advisor's practice. The rollout began with an internal launch for advisor teams, followed by an additional internal training session the week before a client-facing webinar. As part of that approach, bQuest hosted that webinar for clients, centers of influence, and friends of the firm. Halbert Hargrove also named an internal point person, who serves as the firm's go-to resource for advisor questions and as the liaison to bQuest, and plans to continue educating advisors and clients on an annual or semi-annual basis, including through recorded content and future webinars on topics such as home downsizing and modification.

Today, advisors are able to respond very differently when clients face a care crisis. ***"Before bQuest, if a client or family member had a medical event, we typically left the conversation and navigating those care decisions up to the client and their family unless we had a go-to care provider in their area,"*** Strain said. ***"After bQuest, we feel more confident that if a client or family member has a medical event or condition, we have a care platform we can access immediately to help provide appropriate care professionals to evaluate their situation and see what type of care would be available for them."***

That confidence has already opened doors to deeper client relationships, including with family members who were not previously engaged with the firm. In one case, Strain introduced bQuest as an entry point to check in on a client's father, who was experiencing declining health. The conversation prompted the client to have a more detailed discussion with her father about his finances, revealing **15 separate investment accounts held outside the trust. The client has since become co-trustee and obtained power of attorney, ultimately consolidating her father's financial picture and planning to aggregate the assets with Halbert Hargrove.**

Strain sees that kind of ripple effect as one of the more powerful long-term benefits bQuest brings to the firm. ***"I think bQuest will allow us to have a closer relationship with our clients and care for our clients and their family members,"*** he said. By helping families navigate aging in place or find the right assisted living facility, he believes Halbert Hargrove is building trust that will extend across generations.

"The main goal is to take care of current clients and their families, but I think there will be opportunities to expand our client relationships and receive additional introductions as a result of delivering exceptional client service during a pivotal and difficult period in a client or family member's life. bQuest helps make all of that happen," said Strain.



Not a bQuest member?
Learn how bQuest can transform your practice
by booking your **30-minute demo call.**