



Why CaringTide?

CaringTide exists to be a lifelong guide in the Developmental Disability Community. We help each family member achieve their aspirations and honor their loved ones' influence today and beyond. CaringTide serves families through a dedicated team of credentialed fiduciaries, Chartered Special Needs Consultants (ChSNCs), and qualified attorneys for all of your family's needs.



Some of the Many Ways we Help Families



Estate & Legal

- Estate Planning – Structure, Design, Drafting*
- Special Needs Trust Planning*
- Guardianship



Financial Planning

- Special Needs Financial Advising*
- Wealth Management*
- Tax Planning*
- ABLE Account Strategies
- SSI / SSDI
- Grant Funding



Family Support Services

- IEP Review & Meeting Attendance
- Employment Support
- State Waivers
- Caregiver / Direct Support Recruitment
- Transportation
- Housing



Specialty Services

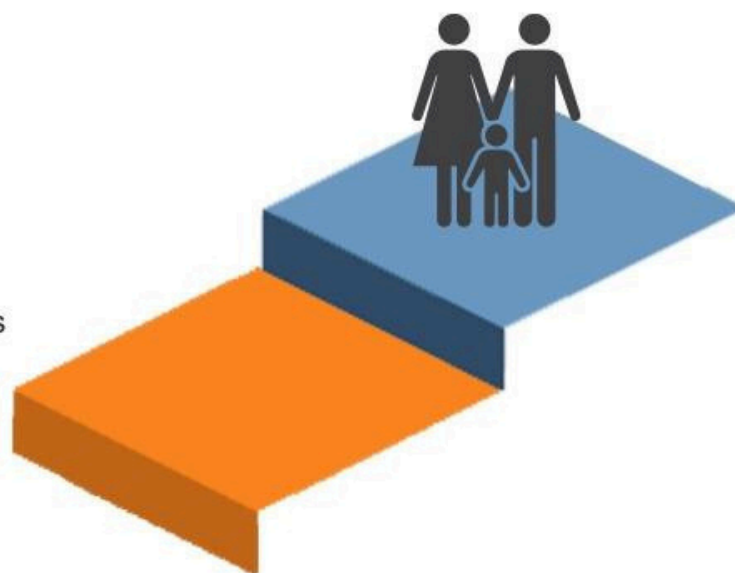
- Transition Planning & Fulfillment
- Family Office Services
- Settlement Planning
- Legacy & Multi-Generational Planning
- Trustee & Trust Administration*

*Services provided by the CaringTide Partner Network

Becoming a Partner Family *In 2 Easy Steps*

- Step 1: Proposal Onboarding ~ 60-90 minutes
Our team will gather facts to assemble your plan
- Step 2: Map Presentation/Decision ~ 30 minutes
Review the planning road map, proposal cost, and decide if you want to move forward.

If we align on your planning process, our team will guide you and begin helping you to implement your plan.



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