



# suburbanlife

Best OF THE Best  
pg. 26

+ **Also Inside:**  
People of the year,  
top attorneys,  
and more

**Bucks County Elder Law** puts its philosophy into action by helping families contend with, if not avoid, crises pertaining to older adults' health and wellbeing. page 70



# Life Care Planning: A Team Approach to Graceful Aging

**Bucks County Elder Law** puts its philosophy into action by helping families contend with, if not avoid, crises pertaining to older adults' health and wellbeing.

by **MATT COSENTINO** | photos by **ALISON DUNLAP**

**A**fter years of practicing “traditional Elder Law,” Henry A. Carpenter II, CELA, knew there had to be a better way.

As one of the first Certified Elder Law Attorneys in this region and a pioneer in the field, Henry has long been committed to pushing the relatively new specialty to higher levels. His Yardley-based firm, Bucks County Elder Law, strives to embrace innovation and enhance the experience for clients who face life-altering decisions.

In 2012, when Henry was first presented with the concept of a law practice focused around Life Care Planning—a holistic, collaborative approach that helps families address the issues associated with aging, disability, or chronic illness—he immediately recognized the potential. Instead of relying on the attorneys to handle the “non-legal” care consideration aspects that such cases required, the firm could let the attorneys concentrate on legal matters and bring in Care Advocates with the appropriate skill set to understand and address each client’s unique circumstances.

“The Care Advocates could take the ball from where we would stop because of our legal training and viewpoint, and get the rest of the story,” Henry says. “By bringing that to the table and all of us in the office coming together, we give a better experience to the client. Not only are we addressing the legal, Medicaid-planning, and asset-protection issues we’re also providing guidance on care and quality-of-life issues. As soon as we started, we realized it was the missing piece. I think it’s been the best thing for us in the office and also the best thing for the clients.”

Today, Bucks County Elder Law has two Care Advocates on its staff, Nicole Bachman and Whitney Shaw. Nicole and Whitney work closely with families to set goals and guide them through the complicated systems of care. The Care Advocates are part of the team at Bucks County Elder Law who focus on their part of the plan, such as appropriate care, possible home or facility care, and the provision of family support. Henry admits that it is difficult to find people who have the right mix of compassion and experience. While the Care Advocates focus on the personal needs of clients, the rest of the team concentrates on needed documents, asset protection, and the preparation for Medicaid when and if needed. About a third of the firm’s clients choose the Life Care-Planning path, and Care Advocates follow them for a minimum of two years.

“As Care Advocates, we take a client-centric approach,” Nicole says. “Initially, we’ll see them here in our office, where the focus is legal matters and how they can use their financial resources to meet their needs. Our job is to get to know them as people, so we spend time with them in their own environment. A lot of times they have complicated medical issues, and we need to address those and help guide them. We also want to see them as people, not just the disease they are battling.”





Today, I would say maybe 40 or 50 percent of our clients now are people who say, **'We don't have a crisis, but we know there could be one out there. How can we get ahead of it?'**

—HENRY A. CARPENTER II, CELA

Henry remembers what it was like prior to Care Advocates, and the “disconnect” that sometimes happened. Now, the communication is much more effective and they are able to tailor a specific plan to each client.

He uses the example of his first Care Advocate, who went on a home visit for a client and noticed that her laundry basket was at the bottom of the steps. After she dug a little deeper, the client admitted to having trouble getting up and down the stairs in her home. The Care Advocate then contacted the client's adult children and began the process of getting a stair lift installed.



Jordan R. Shapiro, an associate attorney with Bucks County Elder Law (left), and Henry A. Carpenter II, CELA

About five months later, the client's daughter called in tears to thank the Care Advocate. One of her mother's neighbors had fallen down the stairs and was headed for a nursing home.

“She said, ‘That could have been my mom but for the fact that you intervened,’” Henry recalls. “In that particular instance—one of a thousand we could think of—we made a real difference in someone's life and kept them out of a nursing home. It's such a gift to the team when someone calls and says, ‘Good job.’”

Because situations for seniors can change quickly, it's vital for Care Advocates to stay on top of each case.

“It's not just our responsibility to know our clients and help advocate for them, but it's also our responsibility to know the resources in the community and to make good, quality recommendations for support as people need it,” Nicole says. “I always use the word ‘pivot’ to indicate how we adapt to our clients' needs as they change during the life care plan process.”

There are other significant ways in which Bucks County Elder Law is different from other firms. In 2006, Henry went through the arduous process of becoming Certified. To do so he had to pass a challenging exam, and he needed recommendations from five other lawyers, three of whom must be Certified Elder Law Attorneys themselves. He is also a founding member and former Chairman of the Elder Law Section of the Pennsylvania Bar Association, which further sets him apart from his peers.

“We have so many clients who come into the office and tell me they met with or hired another Elder Law firm,” he says. “After hearing the advice they were given, I know that they wasted six months and were given the wrong advice, which will actually hurt them and cost them tens of thousands of dollars. Just because someone

read a book on a subject doesn't mean they know what they're doing.”

“Someone said the other day that we're like Mr. Rogers' Neighborhood, because people are always stopping in and saying hello,” Nicole adds. “People get used to our very personal touch. Many firms use a cookie-cutter approach; here, everybody's plan is individualized to who they are, and I think that makes a big difference. That's why people come back to us and why they refer their friends and family.”

Henry encourages anyone who may be in need of the firm's services to schedule a consultation, even before a crisis arises. He explained that there are two types of clients, those who wait until their situation has become urgent and the “dream client” who is proactive.

“Thirty years ago, I didn't have a lot of those dream clients,” he says. “Today, I would say maybe 40 or 50 percent of our clients now are people who say, ‘We don't have a crisis, but we know there could be one out there. How can we get ahead of it?’ That's fantastic, because we can do so much for those clients. Don't get me wrong; we can do a lot for those in crisis too, but we can do so much more when time is on our side.”

Henry offers free, no-obligation, initial consultations and hosts a workshop over Zoom that is open to the public. This workshop often serves as an effective starting point for anyone thinking about hiring an Elder Law Attorney for themselves or a loved one. ■

## Bucks County Elder Law

MAKEFIELD EXECUTIVE QUARTERS  
301 Oxford Valley Road, Suite 101B  
Yardley, PA 19067  
(215) 493-0727  
[BucksCountyElderLaw.com](http://BucksCountyElderLaw.com)