



# Lining Up Professionals and Specialists

At some point, your family will require the services of a medical, financial, insurance or legal specialist. But what is the best way to find one?

Here are some of the common methods of finding specialists and other professionals:

**REFERRALS**—Ask family members and friends who they use and what they think. You can also ask other professionals for referrals; ask your doctor, for instance, for a referral to a specialist. Referrals are valuable because they draw on someone else's knowledge and/or expertise. They are also useful because the people making the referrals know something about your situation and needs.

**ASSOCIATIONS**—Most professions have professional associations that can provide listings of professionals in your area. The state bar association, for instance, can provide names of attorneys in your area, and the various associations representing different medical specialties can also provide information.

**YELLOW PAGES**—This is perhaps the least effective way of finding a specialist or professional, but it is also one of the most common. Since the yellow pages don't give detailed information, this method might best be used in conjunction with one of the above methods to confirm a specialty, location or phone number.

Contact your local Area Agency on Aging for experienced professionals.



[www.nwrcwa.org](http://www.nwrcwa.org)

## Questions to Ask

It is important to set up a consultation visit with any professional. Most specialists offer this option for little or no cost. If they don't, you should consider looking elsewhere.

If you are going with an elderly relative to a consultation meeting, help put together a list of questions to ask them. The answers—and the manner in which the answers are given—can tell you if this person is right for the needs of your family. Remember: your loved one is the client and deserves to get answers from the professional before engaging their services.

You might want to ask some of the following questions, altered slightly according to whether this is a doctor, financial advisor, attorney, insurance salesman, or other professional:

- What is your area of expertise?
- What is your experience in working with elderly clients?
- What are some of the needs that you think elderly clients have?
- Have you handled these kinds of issues (list your family's issues)?
- What license(s) do you have?
- How far in advance does an appointment with you need to be made?
- How do you prefer that previous records be sent to you?
- What is your overall approach to your profession?
- What are your fees?
- For a doctor: Are you a preferred provider for specific health plans? Do you take Medicare/Medicaid?

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