



SPECIALIST HOME MOVE PROJECT MANAGEMENT FOR LATER LIFE



WHEN TO REFER - RECOGNISING THE SIGNS:

Your clients may benefit from our support if you recognise any of the following:

- **The Overwhelmed Client** - They have lived in their family home for 30 or more years and are paralysed by the thought of moving. They know it makes sense but cannot find the energy or clarity to begin.
- **The Solo Client or Distant Family** - They lack a local support network to manage the day-to-day demands of a move, or their family is geographically or emotionally stretched and unable to take on the coordination themselves.
- **The Gridlocked Transaction** - They are struggling to coordinate between estate agents, surveyors, solicitors and removers, causing delays to your legal or financial timeline. Small decisions are becoming big obstacles.

About Sage & Elder:

Sage & Elder provides specialist, end-to-end home move management for people over 60 across Bath, Bristol, Somerset and Wiltshire. Founded by Vicky Whipp, a specialist with years of experience helping older clients and their families navigate complex home moves, we combine that expertise with the empathy and patience that later-life transitions demand.

We are accredited members of the Property Ombudsman, a SOLLA affiliate, HMRC registered for Anti-Money Laundering compliance, and all staff with unsupervised client contact are DBS checked.



OUR SERVICES AT A GLANCE:

- **Home Move Report** - a personalised assessment of options, finances and next steps; an ideal starting point for clients not yet ready to commit to a move
- **Property Finding** - expert search, shortlisting and accompanied viewings
- **Home Move Management** - full project management from instruction to move day
- **Property Preparation & Renovation** - managing adaptation or cosmetic work on the property being left or the new home

HOW REFERRING TO SAGE & ELDER PROTECTS YOUR WORKFLOW

A specialist move manager working alongside you is not just a favour to your client, it protects the quality and pace of your own work.

- **Reduces transaction delays** - we drive the practical timeline so your legal or financial milestones are met
- **Filters communication** - we act as the central coordination point, so you receive only the updates that matter
- **Reduces client stress** - a calmer, better-supported client makes clearer decisions and is easier to advise
- **Reduces transaction risk** - a well-supported client is more decisive and less likely to experience the uncertainty that causes delays or withdrawal.

THE REFERRAL PROCESS - 4 SIMPLE STEPS

Step 1 - Mention Sage & Elder when a client expresses concern about the logistics, timing or emotional weight of an upcoming move

Step 2 - With the client's permission, share their contact details or introduce us via a three-way email to hello@sageandelder.co.uk

Step 3 - We offer a no-obligation 30-minute introductory call to understand their situation and explain how we work

Step 4 - We keep you informed throughout, with client consent, so you always know when the client is ready for the next legal or financial step

RESOURCES AVAILABLE TO YOU

We have prepared an additional document to support the referral process:

The Sage & Elder Transition Guide is written for your clients as a gentle introduction to the home move process in later life that you can share at the point of referral, so the introduction is made on your behalf before they even pick up the phone.

Ask us for a copy or download it at sageandelder.co.uk/professional-referral-partners

"I thoroughly recommend using Sage & Elder. Relocating as a senior presents uniquely different challenges. Vicky facilitated this process for me & transformed what could have been a disruptive upheaval into a smoother transition." - John L.