

THE PARTNERSHIP

An extension of your client and member experience — not a referral, a partnership.

When you bring Sage into a relationship, you keep ownership of it. We work alongside you, report back to you, and ensure your clients or members experience seamless, coordinated care.

HOW WE ENGAGE

- 1 Discovery call with you**
We learn your practice or membership profile, your role, and your goals before any engagement.
- 2 Coordinated introduction**
A warm handoff that positions you as the trusted advisor or club that brought the right team in.
- 3 Ongoing coordination**
We keep you informed at the cadence you choose — quarterly, milestone-based, or as-needed.

“Sage gave us personalized support, compassion, and practical guidance — every step of the way.”
— PHYLLIS W., CLIENT

OUR MODEL

Sage is retained directly by families and partners. We accept no placement commissions or referral fees — ever.

LET'S TALK

Explore a partnership.

A 30-minute introductory call to understand your practice, your members, and where Sage might add value. No commitment — just a conversation between professionals.

SUN-HEE YOON, FOUNDER

Aging navigation across six domains · Host, Sage Pathways Podcast

DIRECT 773-496-4356

EMAIL info@sagelifestyleconcierge.com

WEB sagelifestyleconcierge.com

SCHEDULE A PARTNER CALL
calendly.com/sagelifestyleconcierge

“The professionals and clubs who add Sage to their offering don't lose people. They keep them through the hardest seasons of life.”



SAGE PATHWAYS PODCAST

Conversations on proactive aging and caregiving — with a guest seat for the partner voices families should hear.



FOR PROFESSIONAL PARTNERS

A trusted resource for your aging clients and members.

When life-stage transitions create complexity your expertise doesn't cover, Sage steps in — protecting relationships and extending your value.

LEGAL · FINANCIAL · HEALTHCARE · INSURANCE
REAL ESTATE · CARE OPTIONS & HOUSING

BUILT FOR

- Financial Advisors · Wealth Managers
- Estate Planning Attorneys · Realtors
- Private Membership Clubs
- Business Owners

FOR ADVISORS & ATTORNEYS

Protect what you've built.

Your client relationships are decades in the making. When aging-related complexity hits, those relationships are tested — and often lost.

Financial Advisors & Wealth Managers

Retain assets across generations. Reduce client churn during life-stage transitions.

Estate Planning Attorneys

Bridge the gap between plan execution and real-life implementation when capacity declines.

High-End Realtors

Help senior clients navigate downsizing with dignity — so the transaction closes smoothly.

“You stay the trusted advisor. We handle what falls outside your expertise.”

THE BUSINESS CASE

Why partner with Sage?

A category-leading aging services partner becomes part of your differentiated experience.



Reduce liability

Crisis decisions can unwind careful planning. We help families act on plans, not against them.



Strengthen retention

Clients and members remember who showed up during the hardest seasons. That's who they stay with.



Differentiate your offering

Elevate your practice or club above competitors with an integrated aging services capability.



Reclaim your time

Stop fielding questions outside your scope. We absorb the complexity so you can focus on what you do best.



Deepen loyalty

Show genuine care for people in life's hardest moments — and earn lifetime loyalty in return.

“The right partnership doesn't add work. It removes friction.”

FOR CLUBS & EMPLOYERS

Care for your members and your people.

Private Membership Clubs

Long-tenured members are your most loyal — and most affected by aging. Offer Sage as a concierge benefit that protects membership through life transitions.

CLUB-MEMBER PROGRAMS INCLUDE

- Member advisory hours · AgeWell Series
- Caregiver salons · Confidential navigation

Business Owners & Employers

One in four American adults is a family caregiver — and seven in ten caregivers are employed. Offer Sage as a benefit that supports your sandwich-generation staff and retains experienced talent.

EMPLOYEE PROGRAMS INCLUDE

- Sage advisory hours · AgeWell lunch-and-learns
- Crisis navigation · Resource library

“A benefit your members and team actually use — when they need it most.”