



Clarify. Conserve. Care

PROGRAM OVERVIEW

cognitiveTree provides comprehensive **Cognitive Assessments** designed to support wealth managers and fiduciaries in identifying cognitive decline in clients who may require **conservatorship**. By leveraging neuroTree's **evidence-based assessment protocols**, we help ensure ethical financial decision-making and safeguard assets from mismanagement due to cognitive impairment.

Why It Matters

Many high-net-worth individuals experience **cognitive decline** as they age, putting them at risk of **excessive spending, financial exploitation, and diminished decision-making capacity**. Without proper intervention, wealth managers may struggle to balance fiduciary responsibility with client autonomy. **cognitiveTree** bridges this gap by providing **clinical clarity** to support informed conservatorship decisions.

Program Services

- **Comprehensive Cognitive Assessments**
 - Evaluating memory, executive function, and financial decision-making capacity.
- **Genetics and Nutritional Assessments**
 - Evaluating genetics impacting methylation of certain nutrients such as B12 and B9 that can affect cognitive function.
- **Legal & Fiduciary Support**
 - Objective reports to support conservatorship petitions.
- **Specialized Financial Decision-Making Evaluations**
 - Identifying risk factors for financial mismanagement.
- **Ongoing Monitoring**
 - Periodic assessments to track cognitive changes over time.

Who We Serve

- Wealth Managers & Financial Advisors
- Estate Planning Attorneys
- Family Offices & Trustees
- Court-Appointed Conservators

Why Choose CognitiveTree?

Expert-Led Assessments - Conducted by **licensed clinical professionals** trained in cognitive and neuropsychological evaluation.

Ethical & Evidence-Based - Aligns with fiduciary best practices to protect client assets.

Legal-Grade Reporting - Designed for conservatorship proceedings and financial oversight.