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BAKER PRIVATE ADVISORY LLC
INDEPENDENT BEHAVIORAL HEALTH ADVISORY & ADVOCACY

PREPARED AS

The Referring Professional's Guide

Every opinion in this system is attached to something. This one is not.

WHEN TO BRING IN INDEPENDENT ADVOCACY

Clinicians, physicians, attorneys, fiduciaries, and advisors each hold a defined role. Independent behavioral health advocacy exists for the matters that fall between roles, or exceed them.

Referrals typically make sense when: a client or patient's family needs sustained guidance your role cannot provide; treatment options and avenues need independent exploration before anyone commits; a recommendation or discharge plan needs an independent read; a trust, estate, or fiduciary matter turns on a behavioral health reality; or a family is divided and transmitting that division into your work.

What the work is not: treatment, therapy, diagnosis, formal evaluation, forensic work, or testimony. The advocacy seat is deliberately distinct from the treating and evaluating roles, which is what preserves its independence and protects yours.

HOW A REFERRAL WORKS

1. A professional conversation first

Call or write directly. The first conversation is professional to professional: the situation in outline, whether the firm is the right resource, and what an engagement would look like. No obligation follows from the call.

2. An introduction on your terms

If it fits, the introduction happens the way you prefer: the client contacts Christopher Baker directly, you make a joint introduction, or you simply pass along the direct line. Nothing is marketed to your client.

3. The relationship stays yours

Communication back to you happens only with the client's authorization, at the level the client permits. No referral fees change hands in either direction, so the recommendation stays clean.

INTRODUCING THE FIRM

Language many professionals find useful, adapt freely:

“There is an independent behavioral health advocate I trust for situations like this: Christopher Baker, a licensed clinician who is retained directly by the family, takes no referral fees from anyone, and gives an honest read on what is actually needed. I can make an introduction, or you can call him directly at 401-601-5080.”

THE PROTECTIONS, STATED PLAINLY

- I am retained by the client, and only the client. No one else pays for the engagement.
- I accept no referral fees, commissions, or placement compensation, in either direction, from any program, provider, or facility.
- I hold no financial relationship with any treatment provider and no stake in where a client receives care, or whether they enter care at all.
- When programs or providers come into question, they are appraised on the merits, and the appraisal answers only to the client.
- Where a conflict of interest exists or emerges, it is disclosed, and the engagement is declined or ended.
- I hold no current position with any treatment program or provider organization. My clinical and leadership roles inside the system are previous chapters, and they are disclosed openly on request.
- Discretion is the default in every direction: who I serve, and what I learn, stays private.

Communication back to a referring professional occurs only with client authorization, at the level the client permits. No referral fees change hands in either direction.

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