

Austin Market Research — Competitors, Demand, Referral Channels

Compiled 2026-08-22 · Research data, not legal, tax, or medical advice

Research: Austin Market — Competitors, Demand, Referral Channels

Collected 2026-08-22.

⚠️ UNRESOLVED CONFLICT — DO NOT PUBLISH EITHER VERSION UNTIL CHECKED BY HAND

Two research passes disagree about whether **Fleur de Lis Nurse Patient Advocacy (Susan McCoy, Austin)** publishes pricing.

- **Pass A (pricing research)** reported specific figures from fleurdelisnpa.com/services: **\$150/hr, free 30-min consult, \$400 initial assessment (2-3 hrs), and "A 10-hour retainer would cost \$1,500."**

- **Pass B (this Austin research)** fetched the same site and reports: **"Not one independent patient advocate in the Austin metro publishes a price,"** listing Fleur de Lis among those checked with pricing "none published."

Both claim a live fetch. **Pricing is a volatile field and a self-reported figure cannot validate itself.** Someone must open fleurdelisnpa.com/services in a browser and look. Until then:

- **Do NOT state a competitor's rate anywhere, in the deck or in conversation.**

- The \$150/\$400/\$1,500 structure is still useful as a **PLAUSIBLE** package SHAPE, because it matches published structures at Garnet (Dallas, \$800/8hr), Calliope (CT, \$800), and Seattle (\$1,000 min) — but attribute the shape to the national pattern, not to a named Austin competitor.

1. COMPETITORS — Austin metro

The headline

The local field is **small, fragmented, and weakly commercialised online**. Greater National Advocates lists **8 Austin ZIP advocates** and **15 Texas-wide**. Of the Austin eight: one has a website under construction, one has no findable website, and one is a menopause/bladder specialty practice rather than a general advocate.

The strongest local brand is not a nurse. AdvocateATX dominates Austin search for "patient advocate Austin" and is run by a former anatomy and physiology professor.

Confirmed BCPAs actively practicing in Austin: three — Candace Wenham (AdvocateATX), Jolie Sanchez (CHAT), Susan McCoy (Fleur de Lis).

(A separate pass counted 11 BCPA credential-holders with Austin-metro addresses from the PACB roster. Both can be true: 11 hold the credential, 3 run visible advocacy practices.)

Named competitors

Business	Who	Background	Notable
AdvocateATX advocateatx.com	Candace Wenham, MS, BCPA	NOT a nurse. BS Biology, MS Developmental Physiology (UNT), published medical research, former college professor teaching A&P. Advocate since 2018	Dominates Austin search. Insurance denials and appeals incl. external review, appointment attendance, terminology translation, care coordination, elder care. "Costs vary depending on complexity." 512-967-3363

Business	Who	Background	Notable
CHAT — Compassionate Healthcare Advocacy of Texas chatatx.com	Jolie Sanchez, RN, ACNS-BC, BCPA	"Almost two decades of advanced nursing," clinical adult health CNS	Diagnosis navigation, records and medication review, appointment prep and accompaniment, hospital bedside monitoring , healthcare proxy/advance directives, AL/SNF research, palliative and hospice sourcing, end-of-life planning. Free 30-min consult. Se habla Español. 512-686-8507
Professional Patient Advocates patientadvocatepro.com	Candice Swain, RN, BSN, OCN, CCM + Robbin Grulke, RN, CCM	Swain 30+ yrs, board certified oncology + case management. Grulke 25+ yrs, 17 in case management. Founded 2017	The closest structural analogue to Gigi's concept. Records management, specialist referrals, accompaniment, hospital monitoring and discharge planning , caregiver screening, home safety assessment, remote care management for out-of-town families . Office in Bee Cave . 512-969-8447
Austin Nurse Navigators austinnursenavigators.com	Sharon Goss, RN, BSN	30+ yrs clinical, hospital, research, academic. Published in <i>Am J Clin Nutr</i> and <i>JAMA</i>	Care planning, accompaniment to appointments, ER visits and hospitalisations, medication management, post-surgical rehab compliance
Fleur de Lis Nurse Patient Advocacy fleurdelisnpa.com	Susan McCoy, Ed.D., MSN-Ed., RN, BCPA	Retired Navy Nurse Corps officer. Ed.D. Univ. of Houston 2021. Licensed TX, CA, MN, MT. Motivated by her mother's Alzheimer's care in 2008	Customised care plans, medication review, medical history timelines , records review, treatment research, accompaniment in person or telehealth. Free 30-min consult via Calendly. See pricing conflict above.
INFORMED Healthcare Consultants informedpatients.net	Virginia Ducote Remeny, MSN, RN, CNS + Rebecca Cox, MSN, RN, FNP-C	Remeny: 35 years clinical — critical care, cardiovascular, peri-operative, clinical research. 20 years on the Austin Multi-Institutional Review Board	The closest match to Gigi's exact experience claim. Advocacy, navigation education, care coordination, advance care planning, home visits , accompaniment, insurance plan selection, medical bill interpretation . "Hourly Rates Apply" with no figure — the only Austin advocate to even acknowledge a rate structure publicly. 512-751-6036
BBM Advocate bbmadvocate.com	Belynda Barkley Montgomery, LPTA	NOT a nurse — licensed PT assistant, 25+ yrs. Formerly Texas NeuroRehab Center Austin (TBI, stroke, dementia)	Attendance at exams and visits, information translation and recording, continuous family communication
14th Street Advocacy LLC	Lucy Jones, RN, VA-BC (Austin) + Rachel Garvin, BSN, RN, SANE-A (Bastrop)	Vascular access board certified; sexual assault nurse examiner	Website is a placeholder: "We're under construction."
Live Oak Navigation	Jeannie Lawson, ACS LION	—	No website. Directory listing only.
Lively Health Group (Liberty Hill)	Sheri Gaynor, BSN, RN, CCM	—	No website. Directory listing only.
Healthy Bladder Solutions	Susan Rinkus Farrell, APRN, GNP-BC	Geriatric NP	Niche menopause/bladder, not general advocacy
Bastrop Medical Clinic	Katie Jo Dixon-Blaboe, MSN, APRN, FNP-C	—	The only Austin GNA listing flagged "Medicare Requests Accepted"

Serves Austin from outside: Houston Patient Advocacy — billing/claims advocacy and denial appeals, carries an **Austin client testimonial**. **NOT a competitor despite appearing in searches:** *Focused Advocacy*, 823 Congress Ave — name and downtown address suggest a policy/lobbying firm. Verify before listing.

★ THE REAL COMPETITIVE THREAT IS NOT LOCAL

Solace Health markets directly at Austin (solace.health/city/austin-texas), naming **Ascension Seton and St. David's Heart Hospital**. Lists 35 Texas cities. Claims 200,000+ patients nationally. **"Covered by Medicare and many Medicare Advantage plans in Texas"** — names Anthem, BCBS, UnitedHealthcare, Aetna, Cigna, "700+ more plans." No Austin advocate is named; each works "alongside a supporting physician licensed in Texas."

Understood Care (formerly Kible Health) runs a **Round Rock-specific landing page** naming three area advocates (Daniele Marsh, Holly Sanford, Donald Washer). Explicit claim: "*Part B covers about 80% and a Medigap plan typically covers the rest, so most members in Williamson County pay \$0.*" Fully virtual, all 50 states, Trustpilot 4.8/148.

Why they can bill Medicare and Gigi cannot

CMS Principal Illness Navigation, effective 1 Jan 2024:

| Code | Descriptor | 2024 non-facility |

|---|---|---|

| **G0023** | PIN by certified/trained auxiliary personnel under physician direction, **60 min per calendar month** | **\$80.56** |

| **G0024** | each additional 30 min | **\$50.26** |

- **Must be billed "incident to" a billing physician.** "*The auxiliary personnel (patient navigators) cannot bill Medicare directly.*"
- Social workers and other therapists cannot bill PIN.
- Verbal or written patient consent required annually and documented, because the patient carries a co-pay.
- Minimum 60 minutes per calendar month.

STRATEGIC READ: PIN pays about \$80 for a month's 60 minutes and must flow through a physician's billing entity. This structurally splits the market. Platforms compete at \$0 to the patient on low-intensity VIRTUAL navigation. Independents compete on private-pay, IN-PERSON, high-intensity work — bedside presence, home visits, family coordination — which PIN does not fund and virtual platforms cannot deliver.

That is the moat, and it is the same thing Gigi is naturally best at.

Pricing benchmarks — no Austin figure exists

- **Umbra (formerly AdvoConnection, operated by APHA):** "Hourly rates can be as low as **\$70 per hour** and as high as **\$500 per hour** or more." Structures in use: upfront initial assessment fee, hourly, deposit to an hours bank, retainer, fixed/project fees.
- **Solace (2025-08-13):** \$100-500/hr; \$300-500 in major cities; initial consultation \$225-650; insurance appeal assistance \$600-1,500; hospital discharge planning \$800-2,000; complex cancer coordination \$5,000-15,000+. **TREAT WITH CAUTION — Solace has a direct commercial interest in portraying private-pay advocacy as unaffordable.**
- **Employed** patient advocate wages in Austin, for contrast not competition: ZipRecruiter \$20.49/hr, Indeed \$23.91/hr.

2. DEMAND — Austin demographics

 NAMING CORRECTION

The MSA is **no longer "Austin-Round Rock-Georgetown."** Under the 2023 OMB delineation it is "**Austin-Round Rock-San Marcos, TX**" (**CBSA 12420**) — same five counties: Travis, Williamson, Hays, Bastrop, Caldwell. **Using the old name dates the plan.**

Population, Census Vintage 2025 (ref. 1 July 2025)

Geography	Jul 2025	Apr 2020 base
MSA	2,620,945	2,283,391
Travis	1,389,670	1,290,157
Williamson	752,827	609,059
Hays	304,390	241,064
Bastrop	118,908	97,229
Caldwell	55,150	45,882
Metro growth since April 2020: +337,554 (+14.8%) in five years.		

 THE CORE DEMAND NUMBER

County	65+ Jul 2015	65+ Jul 2025	10-yr change	65+ share
Travis	103,673	161,031	+55.3%	11.6%
Williamson	56,479	102,878	+82.2%	13.7%
Hays	19,750	40,947	+107.3%	13.5%
Bastrop	11,273	19,402	+72.1%	16.3%
Caldwell	5,452	8,408	+54.2%	15.2%
MSA	196,627	332,666	+69.2%	12.7%

THE SENTENCE FOR THE DECK: over the same decade the total metro population grew +30.9%. The 65+ population grew more than twice as fast, and Hays County's 65+ population MORE THAN DOUBLED.

Caveat: the two vintages rebase on different censuses (2010 vs 2020). Standard practice, but it is a cross-vintage comparison, not one continuous series.

Cross-check, ACS 2024 1-yr: MSA 65+ = 318,437 (12.5%); 75+ = 125,905 (4.9%); 85+ = 27,972 (1.1%).

Georgetown city: population 101,345, 65+ = 22,536 = 22.2%, about 4 points above the US share. Median HH income \$92,821. Genuinely bimodal — a retirement magnet inside a family-household boom.

Ability to pay

Geography	Median HH income		Share
MSA	\$99,897	530,189	50.0%
Travis	\$97,013	307,402	49.1%
Williamson	\$112,004	150,392	56.2%
Hays	\$90,182	49,773	45.3%
Half the households in this metro clear \$100K, and Williamson — the retiree county — is the richest at 56.2%. MSA households at \$200,000+: 218,735 (20.6%).			

Median HH income by age of householder (MSA): under 25 \$50,042 · 25-44 \$104,678 · **45-64 \$122,760 · 65+ \$76,921.**

★ **THE DIRECT PRIVATE-PAY TARGET.** Households headed by someone 65+, MSA: **188,458 total**, of which

- \$100,000-124,999: 8,125
- \$125,000-149,999: 6,002
- \$150,000-199,999: 6,660
- **\$200,000 or more: 23,350**
- **\$100K+: 44,137 = 23.4% of all 65+ households. \$200K+ alone = 12.4%.**

INFERENCE WORTH ACTING ON: the 65+ median (~\$77K) sits well below the 45-64 median (~\$123K). The likely **BUYER** for a **premium engagement** is frequently the **ADULT CHILD**, not the patient. Consistent with 45-64 being the metro's highest-earning band and 54.3% of the metro workforce being professional/managerial. **Marketing should speak to the adult daughter, not only to the patient.**

Functional need

Metric	MSA
Households with one or more people 65+	227,887 (21.5%)
65+ living alone	70,995 (22.9% of 65+ in households)
65+ with a disability	92,805 (29.1% of the 65+ population)
Uninsured 65+	3,642

Metric	MSA
~71,000 metro residents aged 65+ live alone. That is the raw addressable pool for the "nobody at the bedside" problem.	

Migration — where to site the practice

Year ending 1 July 2025, MSA: total change +53,796; natural +16,621; international +17,457; **net domestic +19,860**.

| County | **Net domestic migration** |

|---|---|

| **Travis** | **-6,590** |

| **Williamson** | **+14,764** |

| **Hays** | **+7,545** |

| Bastrop | +2,254 |

| Caldwell | +1,887 |

Travis County has LOST domestic migrants three years running (-10,239 in 2023, -13,213 in 2024, -6,590 in 2025) and now grows only on international migration and births. Williamson and Hays absorb the domestic inflow. A practice sited on the Travis/Williamson line follows both the money and the age curve.

Retiree in-migration, ACS 2024 1-yr, movers age 65+: from a different STATE ~4,100-4,300 into the MSA (1,266 into Williamson); from a different Texas COUNTY 6,912 (1,702 into Williamson). **Total 65+ arriving from outside their county: ~11,200/yr.**

Caveats: the intra-Texas figure includes Travis-to-Williamson moves, so it overstates genuinely new arrivals. These are 1-year ACS cells with wide margins of error. Directional only.

Active adult communities: Sun City Texas, Georgetown (Del Webb) is confirmed the largest active adult community in Texas; new homes \$339,990-\$560,990+; 3 golf courses, 4 fitness centers, 8 pools, 150+ clubs. **The widely cited "9,900 homes" comes from 55places.com, a real-estate marketing site, NOT a primary source. Neither Del Webb nor the community association publishes a home or resident count. DO NOT PRINT ONE.**

Kissing Tree, San Marcos: confirmed real, 1,300-acre gated 55+ by Brookfield and David Weekley. **"3,200 homes planned" is also 55places.com. UNVERIFIED.**

Employers

All three major hospital systems are in Austin's top employment band (6,000+): Ascension Seton (HQ), Baylor Scott & White, St. David's HealthCare Partnership (HQ). Also Amazon, Apple, Austin ISD, City of Austin, Dell (HQ), Federal Government, H-E-B, Round Rock ISD, Samsung (HQ), State of Texas, Tesla (HQ), UT Austin.

2,000-5,999 band includes **Austin Regional Clinic (HQ), Clinical Pathology Laboratories (HQ), US Dept. of Veterans Affairs**, plus Accenture, AMD, Deloitte, Google, IBM, Meta, Oracle (HQ), Visa, Whole Foods (HQ).

St. David's says it is "the fourth-largest private employer in the Austin area, with more than 10,600 colleagues across more than 160 healthcare sites."

White collar concentration: MSA management/business/science/arts occupations **54.3%** of employed; Travis **58.4%**. Bachelor's or higher: MSA **52.3%**, Travis **58.7%**.

3. HOSPITALS — and the sharpest marketing facts in the whole research set

29 CMS-certified hospitals across the five counties (CMS file modified 2026-07-22): 18 acute care, 2 critical access, 5 psychiatric, 2 children's, remainder specialty.

System counts are inconsistent — confirm before printing

- **Ascension Seton** claims "12 hospitals, 13 ERs, 4,200+ providers at over 200 sites." Its own directory lists **14**. Healthcare Dive says 13. **The mapping is UNVERIFIED.**
- **St. David's** homepage says **8 hospitals, 4 freestanding ERs**; its About page says "more than 160" sites while the homepage says "over 180"; its locations directory lists **8 freestanding ERs and 9 hospitals. Confirm before printing a count.**

- **Baylor Scott & White** publishes no Austin-region hospital count. Verified hospital-by-hospital: Austin, Round Rock, Pflugerville, Buda, Lakeway, Taylor, Marble Falls.

UT Health Austin / Dell Med — three things to get right

1. **There is no Dell Med-owned hospital today.** Dell Seton Medical Center at UT is **operated by Ascension**. It is Dell Med's primary teaching hospital and the region's **adult Level I Trauma Center**.
2. **"UT Health Austin" has been rebranded.** uthealthaustin.org now 308-redirects to utmedicine.org ("**UT Medicine**"). Facilities are outpatient clinics, mostly at 1601 Trinity St.
3. **A UT-owned hospital is coming: "UT Dell Medical Center."** \$750M gift from the Michael & Susan Dell Foundation plus \$100M from Tench and Simone Coxe. \$10B fundraising goal, **300-500 beds, 300+ acres near the J.J. Pickle Research Campus in North Austin, groundbreaking later in 2026, opening 2030**, phased through 2032, integrated with MD Anderson. (KUT, 2026-04-21.)

Market share — no published figure exists

⚠️ **The widely circulated "89% of inpatient discharges" figure for St. David's + Seton combined comes from a Fierce Healthcare "Research and Markets" press-release page that returned 403 and could not be dated. Fierce's Research-and-Markets releases are typically a decade or more old. DO NOT CITE IT.**

Two independent derivations from published per-hospital figures:

| System | CMS cost report discharge share | AHD discharge share |

| ---|---|---|

| **St. David's** | 48.5% | 55.1% |

| **Ascension Seton** | 40.8% | 32.7% |

| Baylor Scott & White | 7.4% | 8.8% |

| CHRISTUS Santa Rosa | 2.5% | 3.3% |

Honest range: St. David's ~48-55%, Ascension Seton ~33-41%, BSW 7-9%. Methods diverge because one includes Dell Children's and critical-access hospitals (lifting Ascension) and the other includes St. David's Georgetown and Heart Hospital (lifting St. David's).

A real data hole: Texas DSHS flags **every Ascension Seton / Dell facility as "Exempt facility" for 2Q, 3Q and 4Q 2024** after filing certified data in 1Q. **Ascension's Central Texas discharges are absent from the Texas public-use inpatient file for three quarters of 2024.** Any DIY market-share build off state data will badly understate Ascension.

★ ER WAIT TIMES — the strongest single argument for the practice

CMS Timely and Effective Care, released 2026-08-13. OP-18b measurement period 1 Oct 2024 - 30 Sep 2025; ED volume CY2024.

Hospital		Psych ED minutes	
Dell Seton at UT	249	328	—
BSW Round Rock	195	—	59,618
Ascension Seton Medical Center Austin	184	242	—
Ascension Seton Williamson	179	182	—
Ascension Seton Northwest	173	382	—
Ascension Seton Hays	163	—	—
St. David's North Austin	163	192	88,622
St. David's Medical Center	160	263	87,708
CHRISTUS Santa Rosa San Marcos	143	202	34,290
Ascension Seton Cedar Park	142	247	32,329
St. David's South Austin	138	219	93,768
BSW Pflugerville	138	—	23,770
St. David's Round Rock	133	—	51,828

Hospital		Psych ED minutes	
Ascension Seton Southwest	130	—	—
BSW Austin	117	—	10,412

Benchmarks: Texas median 145 min. National median 162 min. National top decile 100 min. Texas psych median 233. National psych median 257.

Three sentences worth using:

- 1. Dell Seton's 249-minute median ED stay runs 72% above the Texas median and 54% above the national median. Its psychiatric ED median of 328 minutes (5.5 hours) is 41% above the Texas psych median.**
- 2. Ascension Seton facilities cluster at the slow end (130-249 min); St. David's clusters at the fast end (133-163). Ascension Seton Northwest's psych ED median of 382 minutes (6.4 hours) is the worst number in the market.**
- 3. The three St. David's Austin campuses each process 88,000-94,000 ED patients a year — roughly 270,000 ED encounters annually across three sites.**

Quality ratings — and they disagree with each other

CMS 4 stars: Dell Seton, Ascension Seton Northwest, Ascension Seton Williamson, St. David's Medical Center, BSW Round Rock, BSW Pflugerville, BSW Marble Falls, CHRISTUS San Marcos.

CMS 3 stars: Ascension Seton Medical Center Austin, Ascension Seton Hays, Ascension Seton Cedar Park, St. David's South Austin, St. David's North Austin, St. David's Round Rock.

Most Ascension Seton and Dell Seton ratings carry **footnote 29** — "calculated using partial performance period data due to a CMS-approved exception" — itself a residue of the 2024 cyberattack.

Leapfrog Spring 2026: A — Ascension Seton Northwest (Straight A), CHRISTUS Santa Rosa San Marcos (Straight A), BSW Round Rock, BSW Pflugerville, BSW Lakeway, BSW Marble Falls. **B** — Dell Seton, St. David's Medical Center, St. David's North Austin, St. David's Round Rock, St. David's Georgetown, Ascension Seton Medical Center Austin, Ascension Seton Williamson, Ascension Seton Cedar Park, Ascension Seton Hays. **C** — **St. David's South Austin Medical Center.**

★ **St. David's South Austin is the only C grade in the metro AND the metro's highest-volume ED at 93,768 patients a year. That combination is the sharpest single marketing fact in this research.**

Note the ratings disagree: Ascension Seton Northwest earns a Leapfrog A but has the worst psych ED wait in the market. St. David's Medical Center earns 4 CMS stars but a Leapfrog B. Neither rating is a proxy for the other — which is itself a good argument for hiring someone who knows how to read them.

Texas statewide, Spring 2026: **#12 nationally, 86 A's out of 226 graded (38.1%)**, up from #16 and 33.2% in Fall 2025.

★ BILLING DISPUTES — TEXAS IS THE NATIONAL OUTLIER

CMS Federal IDR Supplemental Tables, dispute initiations by state:

| Quarter | **Texas** | #2 state |

|---|---|---|

| 2025 Q1 | **207,085** | Arizona 41,583 |

| 2025 Q2 | **249,077** | Arizona 41,662 |

| 2025 Q3 | **244,275** | Arizona 42,725 |

| 2025 Q4 | **280,355** | Arizona 44,934 |

| **CY2025 total** | **980,792** | — |

Texas filed roughly 981,000 federal surprise-billing disputes in 2025 — about SIX TIMES the next-highest state, every single quarter.

Corroborated at line-item level from the raw 1.4 GB public use file: of 1,407,684 national dispute line items in Q4 2025, **665,036 (47.2%) had a Texas location of service.**

National context, CY2025: **2,559,375 disputes initiated** (+16% half over half). **Emergency department services account for 52% of all payment determinations.** Providers prevailed in ~85% of determinations. 42% of disputes had eligibility challenged; 19% were found ineligible.

★ **READ THE ED SECTION AND THIS SECTION TOGETHER: ED services drive half of all surprise-billing disputes nationally, Texas generates roughly six times its share of those disputes, and Austin's busiest ED sits in the metro's only C-graded hospital.**

Consolidation and disruption, 2024-2026

- **Seton Shoal Creek behavioral health CLOSED** (54 beds), services moved to Cross Creek Hospital May 2024.
- **Seton Bastrop is effectively dead as an inpatient facility** — CMS shows 7 beds and 3 discharges for FYE 09/30/2024; DSHS flags it "Closed, no data submitted" in 4Q24. Its ED page is still live.
- **Ascension bought out Cedar Park Regional** (126 beds), \$460M, April 2025.
- **\$800M Williamson County investment** approved Oct 2025: Cedar Park Hospital \$480M, Seton Williamson \$275M, Cedar Park wound care \$25M, Leander emergency center \$20M. **The Williamson tower — six stories, 160 beds, 400 jobs — completes summer 2026.**
- **BCBS Texas contract brinkmanship, RESOLVED.** BCBSTX warned 2025-12-11 that Ascension Seton would exit Blue Choice PPO, Blue Essentials, Blue Advantage HMO, MyBlue Health and both Medicare Advantage plans on 1 Jan 2026. **Resolved 2025-12-31. This is a live advocacy-demand signal — network disruption scares recur here and terrify patients mid-treatment.**
- **St. David's \$180M South Austin patient tower**, work began March 2026.
- **No evidence of any Ascension Seton sale or divestiture. The only Austin transactions are Ascension buying.**

The Ascension ransomware attack — context for why records are a mess

Fact	Value
Detected	8 May 2024
Group	Black Basta (attributed by CNN sources, not confirmed by Ascension)
Scope	Files taken from 7 of 25,000 servers
Final count reported to HHS OCR	5,599,699 individuals
Rank	3rd-largest US healthcare breach of 2024
Data exposed: SSNs, driver's licences, passport numbers, bank and credit card details, Medicare/Medicaid IDs. Operational impact: EHR offline, patient portal down, ambulance diversion at some facilities, elective care paused. Ascension posted a \$1.1B net loss for FY2024 (system-wide, not attributed to the attack).	
Litigation: consolidated before Judge John Ross (E.D. Mo.). On 24 Sept 2025 he allowed negligence and state consumer-protection claims to proceed , finding "imminent and ongoing risk" of identity theft. In discovery as of Sept 2025.	
SOURCING CAVEAT: the 5,599,699 figure is secondary (HIPAA Journal reporting the OCR entry). The HHS OCR portal is a JS app returning nothing to a fetch. If this number is load-bearing, pull it manually.	

4. ADJACENT COMPETITORS — the substitutes that matter most

Geriatric care management — the most directly substitutable category

Several explicitly sell "medical advocacy" and employ RNs.

| Firm | Staffing | Notable |

|---|---|---|

| **Senior Services of Austin** | **10 named care managers: 8 social workers (LCSW-S/LCSW/LMSW) + RN Nanci W. Kahn** | Self-described "Geriatric Care Management company that consists of Social Workers and Nurses." Sells "**Comprehensive Care Coordination Medical Advocacy**," guardianship, long-term care planning, discharge planning, crisis intervention, housing placement. 512-574-1722 |

| **LiveWell Care Management** (formerly Elder Advisory Group) | **15 care managers** at the Austin office | **Medical Care Management explicitly framed as "nurse advocacy."** States plainly: "*Our geriatric care management services are private-pay. Medicare/insurance does not cover GCM services, and we do not accept Medicaid.*" 30+ years |

| **Family Tree Private Care** | Aging Life Care Professionals from nursing, social work, gerontology | Care management "like a concierge," professional caregiving, **private-duty nursing**. Founded 2011. TX (7 metros), CO, AZ |

| **Mir Senior Care Management** | Lina Supnet-Zapata, MBA, CMC, TxCG | Operating since 2004. **Communication support with medical providers.** Specialist support for LGBTQ+ elders. Serves Austin, Round Rock, Georgetown, Lakeway, San Marcos, Dripping Springs, Buda, Kyle |

| **Heavenly Caregivers** | Nursing, social work, gerontology, psychology backgrounds | Medication management, appointment coordination, health monitoring, financial guidance, legal document organisation, plus private-duty nursing. 24/7 |

| **CareFor** | **Catherine Vergara, RN, BSN, TxCG, CCM — on the ALCA South Central Chapter board** | carefortexas.org refused connection |

| **Nurses Case Management** | "Registered Nurses who provide compassionate medical case management" | **Website fails TLS handshake.**

Current operating status UNVERIFIED |

Evidence of local consolidation: accountableaging.com now 301-redirects to familytreecares.com.

None of these publishes a price. ALCA typical fee ranges UNVERIFIED (aginglifecare.org returns 403).

Hospital- and payer-employed navigators — the free substitute

- **Ascension Seton Behavioral Health Resource Navigators — free.** Cancer Survivor Center nurse navigator. Maternity nurse navigators. **Ascension is actively hiring RN Patient Navigators** in orthopaedics, women's health, children's comprehensive care.
- **St. David's Nurse Navigator Program** — scope, cost and staffing UNVERIFIED.
- **Austin Regional Clinic Nurse Navigators** — a Population Health programme with Chronic Care Nurse Navigators assigned per clinic plus Centralized Transitions Nurse Navigators. **Eligibility and cost not stated.**

★ **THE POSITIONING SENTENCE:** these programmes are free, embedded, and disease- or episode-specific. They are bounded by the employer's interest. They do not appeal that employer's bill, dispute that employer's discharge decision, or accompany a patient to a competitor for a second opinion. That boundary is the independent advocate's entire reason to exist.

Concierge medicine — the only local category with published prices

Austin Medical Partners Direct Primary Care, by age band: 18-29 **\$350/mo** · 30-39 \$350 · 40-49 \$350 · **50-59 \$500/mo** · **60-65 \$750/mo.** 12-month minimum, payment due at enrollment. **Not available to Medicare patients.**

Others (snippet only): MDVIP \$525-2,300/yr (one named Austin MDVIP physician at \$1,800/yr); independent concierge \$100-350/mo; DPC alternatives Arbor Family Medicine \$59/mo, Texas Direct Medical Care \$90/mo.

★ **THE GAP THIS EXPOSES:** a 60-65-year-old Austin resident already pays \$9,000/year for direct primary care, and Medicare patients are **EXPLICITLY EXCLUDED** from that product. Seniors have the most navigation need and the fewest paid-access options. That is a clean willingness-to-pay anchor and a clean market gap in one fact.

Medical bill review

No Austin-domiciled medical bill review firm was identified. Served by national firms (Medical Cost Advocate, Resolve, Medical Bill Gurus) and the Houston practice. Locally, AdvocateATX sells insurance denial appeals and INFORMED sells medical bill interpretation. **Given ~981,000 Texas federal IDR disputes in 2025, billing and denial advocacy is the LEAST locally-contested service line in this market.** (But see the Ch. 394 registration question in the legal research before pricing it.)

5. REFERRAL CHANNELS

★ THE TWO BEST CHANNELS, BOTH FREE

Senior Industry Services (SIS) — "SIS Just Networking." Weekly, Tuesday mornings 8:30-10:00 AM, rotating host senior living communities across Travis, Williamson and Hays. Attendees: home health, hospice, assisted living, rehab, placement, senior-support professionals. Its own copy: *"No pitches. No pressure. Just consistent, in-person connection with the people who refer, recommend, collaborate, and make senior care work in Central Texas."* **Explicitly welcomes solo entrepreneurs. No fee stated.** Powered by Oasis Senior Advisors.

★ **AND: the SIS senior care directory has 12 categories including Geriatric Care Management but NO "patient advocate" category at all.** That is a market-awareness gap worth exploiting — being the first to define the category locally.

Aging Services Council of Central Texas. Hosted by the Area Agency on Aging. Monthly, second Thursday, 12:00-2:00 PM at 6800 Burleson Rd Bldg 310 Ste 165, Austin 78744; some months virtual. Covers Travis, Bastrop, Caldwell, Hays, Williamson. Open to community partners, professionals, organisations and individuals. **Registration \$0.00, no membership fee.** contact@agingservicescouncil.org. **6800 Burleson Rd is effectively the aging-network hub for the region** — it is also the ADRC address.

AGE of Central Texas. Nonprofit since 1986. Pathways (resource navigation, caregiver support groups, care planning), H.E.L.P. medical equipment lending, Memory Connections, adult day centers. **Four sites: HQ Austin, Round Rock, South Austin, and Georgetown.** 512-451-4611.

Aging in Place Solutions. Austin 501(c)(3). States it "*only work[s] with verified providers in the Austin area*" — **an explicit provider-vetting/referral posture worth applying to.** 512-503-2778.

DO NOT include AustinUP — austinup.org failed DNS resolution and a snippet noted the organisation "may be closing." Treat as defunct.

Area Agency on Aging / ADRC

Caveat: capcog.org is behind Cloudflare and refused every fetch. This subsection is snippet-level. Confirm by phone.

- Operated by **CAPCOG (Capital Area Council of Governments)**. **10 counties:** Bastrop, Blanco, Burnet, Caldwell, Fayette, Hays, Lee, Llano, Travis, Williamson.

- **Benefits Counseling Program** — HICAP/SHIP-certified Medicare counselors covering Parts A/B/C/D, Medicare Savings Programs, Medigap, **appeals and representation.** **512-916-6178.**

- **Long-Term Care Ombudsman Program** — resident rights and complaint resolution for nursing facility and assisted living residents.

- **ADRC of the Capital Area** — **staff cannot approve benefits or submit Medicaid applications, referral and guidance only.** (*A clean handoff boundary for a paid advocate.*) **Lifespan Respite funding** for unpaid family caregivers of someone 60+, ~25 hours annually. 855-937-2372.

Elder law attorneys

Firm	Notable
The Garrett Law Firm (Terry L. Garrett), elderlawaustin.com	CELA certified by NELF. Texas NAELA board member, VA-accredited, credentialed mediator. Serves Travis, Williamson, Hays, Bastrop
Texas Trust Law (Brad Wiewel), texastrustlaw.com	Satellite offices by appointment in Georgetown, Horseshoe Bay, Dripping Springs. Elder law + Medicaid planning, guardianship, special needs
Jason S. English Law	Serves Austin, Round Rock, Cedar Park, Georgetown, San Marcos
Willi Law Firm , atxellderlaw.com	Medicaid crisis planning, POAs, advance directives, guardianships
Walberg Patterson Law	Elder law, Medicaid, guardianship, probate
Note: Texas certifies " Estate Planning and Probate Law, " NOT elder law as its own specialty. Directories: Texas NAELA chapter (naela.org), TBLS (tbls.org), NELF (nelf.org).	

Financial advisors serving retirees

- ★ **REAP Financial Group** — SEC-registered, **explicitly retiree-focused**, three offices including **Georgetown.** **Runs retirement webinars and a "Wealth Radio" podcast** — **an existing senior-audience education channel worth approaching for a guest spot.** 512-249-7300.
- Austin Asset** — fee-only, ~39 years old, retirement preparation and life-event planning.
- Larger RIAs (AUM figures are a third party's, unconfirmed): LeafHouse Financial ~\$15.4B, Hub Investment Partners ~\$8.98B, Venturi Private Wealth ~\$3.18B, Oxbow ~\$2.10B, Maslow ~\$2.07B.

Estate planning

Nielsen Law PLLC (Elizabeth Nielsen) — **board certified in Estate Planning and Probate Law by TBLS.** Includes **special needs planning.**

· **Osborne, Helman, Scott, Knisely & Stanton** — asset protection, fiduciary litigation, probate. · **Texas Trust Law** (both elder law and estate

planning under one roof).

Trust companies: UNVERIFIED, none found. Leave the category empty rather than guess.

Senior living communities

Community	Type	Operator
Querencia at Barton Creek	Life Plan / CCRC — IL, AL, memory care, skilled nursing, rehab. Newsweek 2025 "America's Best CCRCs"	Lifespace Communities
Longhorn Village	Life Plan Community, Steiner Ranch	—
Westminster	CCRC with Life Care contracts. IL, AL, memory support, skilled nursing, short-term rehab	LCS (Life Care Services)
The Village at the Triangle	IL, AL, memory care	—
The Villas by Buckner	IL, AL, memory care, respite	Buckner (nonprofit, faith-based)
The Wesleyan, Georgetown	IL (apartments + cottages), AL, memory care	Wesleyan Homes (nonprofit)
Brookdale Georgetown	Assisted living, capacity 54	Brookdale
Sun City Texas	55+ active adult, NOT a licensed care setting	Del Webb
The Summit at Westlake Hills — no working first-party website found, directory listings only. Treat as unconfirmed.		

Home health and home care

Private duty / non-medical: Visiting Angels Austin (owner Sue Guerrero, serves **Sun City**) · Home Instead Austin (since 1994) · **MGA Homecare** (private-duty nursing, skilled nursing visits, PT/OT/speech) · Team Select Home Care · 🌟 **Family Eldercare** — nonprofit offering in-home care alongside **guardianship, financial advocacy/money management, housing services, care coordination**; intake/referrals **512-483-3580**; Travis, Hays, Williamson.

Medicare-certified home health: Halcyon Home (Austin + San Marcos, founded by a Physician Assistant, 24/7 on-call RN) · CenterWell Home Health · Texas Home Health Skilled Services · Choice Austin Homecare. **41 Austin-area home health agencies listed on carelistings.com.**

CAVEAT: Medicare-certification labels come from aggregator listings. Re-verify each against CMS Care Compare before relying on them.

Oncology

- **Texas Oncology — Austin area: 11 CITIES** (Austin, Bastrop, Cedar Park, Georgetown, Harker Heights, Kyle, Lakeway, Leander, Marble Falls, Round Rock, San Marcos). **Note that is a count of cities, not clinic sites — the true site count is likely higher.** Statewide 490+ physicians, 210 locations.
- **Austin Cancer Centers** — physician-owned, multidisciplinary. Medical oncology, hematology, gynecologic, neuro-oncology, breast, pediatric, radiation therapy incl. CyberKnife and AccuBoost, clinical trials. **Markets a "48-hour promise" to appointment after diagnosis.** (A Yelp snippet claims nine locations and 14 physicians; the practice publishes neither. UNVERIFIED.)
- St. David's South Austin has **the region's only adult Transplant and Cellular Therapy Program.**
- ⚠️ **CORRECTION: Texas Center for Proton Therapy is NOT in Austin.** It is in Irving (DFW). Austin patients are referred there; it is not a local site.

Chambers and BNI

Greater Austin Chamber · Round Rock Chamber · Georgetown Chamber · Cedar Park Chamber. BNI regional body is BNI DFW/Texas; visitor rule is two visits before deciding. Named Austin-area chapters: BNI ATX Luxury Connectors, BNI Smart Set (N Austin).

No Austin chapter of NAHAC or APHA exists. The closest real professional homes are the Aging Services Council of Central Texas and SIS.

6. THE FOUR FACTS THAT MOST SHAPE THE BUSINESS CASE

1. **No Austin independent advocate publishes a price** (see the conflict flag at the top), **three hold BCPAs, one has a broken website and two have no website at all.** The local field is small and weakly commercialised. National benchmarks put private-pay advocacy at \$70-500/hr with no local price anchor to compete against.
2. **Two Medicare-billed national platforms (Solace, Understood Care) are already marketing into Austin and Round Rock at \$0 to the patient** — but the PIN codes underneath pay ~\$80.56 per 60 minutes, must be billed incident-to a physician, and **cannot be billed by an independent advocate directly.** That structurally separates cheap virtual navigation from premium in-person work.
3. **The metro's 65+ population grew +69.2% in a decade against +30.9% overall. ~71,000 seniors live alone. 92,805 have a disability. 44,137 households headed by someone 65+ clear \$100K.** Growth and money are concentrating in **Williamson and Hays** while **Travis has lost domestic migrants three years running.**
4. **Texas filed ~981,000 federal surprise-billing disputes in 2025, about 6x the next state, every quarter. ED services drive 52% of national determinations. Dell Seton's median ED stay is 249 minutes. The metro's busiest ED (St. David's South Austin, 93,768 visits/yr) holds its only Leapfrog C grade.**

7. DO NOT PRINT WITHOUT A FRESH CHECK

- The "89% of inpatient discharges" market share figure (403'd source, undated, likely a decade old)
- Any hospital count from either system (their own pages contradict each other)
- Sun City or Kissing Tree home/resident counts (real-estate marketing sources)
- The 5.6M Ascension breach figure (secondary reporting of an OCR entry)
- Any Austin competitor's hourly rate (see the conflict flag)
- Never mix AHD staffed beds with licensed beds in one table (they differ 15-30%)

8. CATEGORIES THAT CAME BACK EMPTY

Austin-domiciled trust companies · Texas HHSC hospital complaint volumes (site 403s) · TDI state IDR/mediation counts (none published) · Medical debt data for Texas/Travis County · Yelp and Google Business ratings for Austin advocates (403 on every page) · NAHAC and Umbra/APHA Texas member lists (JS-rendered) · BNI Austin chapter roster (403) · BLS occupational data for CBSA 12420 (bls.gov 403s)