



WELLNESS CARE PLAN (SAMPLE)

Patient Agreement

This agreement shall be effective as of August 15th, 2026 between Palm Beach Wellness Institute and Jane Doe. This individualized Intensive Wellness Care Plan is designed as a structured 8-week therapeutic and integrative wellness intensive through Palm Beach Wellness Institute.

Wellness Care Plan Overview

This Wellness Care Plan has been created in alignment with the patient's current needs, presenting concerns, and treatment goals. The intensive combines individual therapy, family therapy, coaching, brain health assessment, neurofeedback, movement-based support, and restorative wellness services.

The goal of this 8-week intensive is to create a structured and supportive environment where the patient can begin engaging in therapeutic work while the team completes assessments to inform ongoing treatment. The plan will focus on the patient's current presentation, mental health, and goals while also considering the broader family system, environmental stressors, protective factors, and patterns that may be contributing to the patient's emotional distress.

Findings from therapy, coaching, neuropsychological testing, and the qEEG brain mapping will be integrated to support a cohesive set of recommendations at the conclusion of the intensive.

All services will be delivered within each provider's scope of expertise and may be adjusted based on clinical presentation, provider availability, scheduling logistics, and needs identified throughout the intensive.



Interdisciplinary Collaboration

This Wellness Care Plan is built around a coordinated, team-based model. Providers will communicate throughout the intensive so that observations, assessment findings, and recommendations are reviewed together rather than in isolation.

An initial clinical case conference has already been completed to review presenting concerns, early clinical impressions, and initial planning considerations. The next case conference will occur just prior to the start of the intensive and will include the full provider team. This meeting will align the team around provider roles, clinical priorities, family context, assessment goals, and the structure of the 8-week intensive.

A final case conference will occur at the conclusion of the intensive to integrate provider observations, assessment findings, and treatment recommendations into a cohesive next-step plan.

The family is welcome to attend the full-team case conferences.

Protective Factors

- Highly motivated to engage in assessment and begin therapeutic work
- Access to a coordinated, private, and supportive treatment environment
- Supportive parent who is actively seeking appropriate care
- Strong cognitive abilities, pattern recognition, and capacity for insight
- History of strong academic functioning and future orientation
- Prior sports involvement, reflecting discipline, commitment, and resilience
- Ability to articulate internal experience when patient feels emotionally safe
- Capacity to form meaningful relationships and set self-protective boundaries
- No reported substance use



Risk Factors

- Symptoms of anxiety impacting quality of life and emotional functioning
- Trauma-related stressors, including family history, parental divorce, and sibling-related trauma
- Family-system complexity that may influence symptoms, coping, and treatment engagement
- Disordered relational patterns requiring education and support
- Difficulty verbalizing internal distress due to strong outward functioning
- Emotional overwhelm, avoidance, or shutdown when addressing difficult material
- Need for continued support beyond a short-term intensive model

Goals for Care Plan

- Begin therapeutic work in a structured and supportive setting
- Support emotional regulation, distress tolerance, and self-awareness
- Assess how family-system dynamics may be contributing to current distress
- Provide coaching support focused on resilience, identity, hope, and personal agency
- Gather objective data through 19-channel qEEG brain mapping
- Use neuropsychological testing to support diagnostic clarity and treatment planning
- Better understand emotional, behavioral, relational, and nervous system patterns
- Integrate provider observations into a cohesive clinical picture
- Develop recommendations for continued therapeutic, medical, brain health, family-system, and wellness support



Care Plan Components

Program Oversight

Provider: Karen Flannery, MD

Frequency: Ongoing

Program oversight is included to ensure the intensive remains clinically informed.

Dr. Flannery's role may include:

- Oversight of the overall intensive structure
- Review of relevant clinical considerations and findings
- Collaboration with the care team regarding treatment planning

Care Coordination

Provider: Jessica R.

Frequency: Ongoing

Care coordination is included to support implementation, communication, and alignment across the intensive.

Care coordination includes:

- Coordination of the 8-week intensive schedule
- Communication with patient, family, providers, and referent as appropriate
- Scheduling and facilitation of interdisciplinary case conferences
- Monitoring of engagement, tolerance, and schedule flow
- Collection of provider observations and recommendations
- Support with development of final integrated recommendations

Individual Therapy + Family Therapy

Provider: Maggie D.

Frequency: 1x per week + 5 hours family therapy

Individual therapy will serve as the core therapeutic component of the 8-week intensive. Sessions will focus on beginning to understand the patient's internal experience, current distress, trauma-related themes, coping patterns, and treatment needs.



In addition to individual work, Maggie will provide five additional hours of family therapy to begin exploring family dynamics, communication patterns, relational stressors, and how the family system may be impacting emotional functioning and treatment needs.

Therapy may address:

- Family stressors and relational dynamics
- Communication patterns within the family system
- Emotional regulation and distress tolerance
- Trauma-related emotional patterns
- Coping strategies and protective patterns
- Self-worth, identity, and internalized pressure
- Initial goals for continued individual and family therapy after the intensive

Transformation Coaching

Provider: Andrea V.

Frequency: 2 sessions

Coaching with Andrea will use principles from her Developing Strength program. This work is designed to help build self-awareness, resilience, and connection to her own internal strengths.

Coaching may focus on:

- Strengthening hope, self-trust, and personal agency
- Supporting emotional resilience and daily coping tools
- Translating therapeutic insight into real-life action

Nervous System Regulation Coaching

Provider: Jessica R.

Frequency: 1x per week

Coaching with Jessica will help Jane bridge the gap between insight and daily implementation by applying nervous system regulation tools in practical, real-life situations.

Coaching may focus on:

- Guided reflection to review progress, identify barriers, and support consistency
- Practical integration of therapy skills and regulation tools into daily life
- Coaching around real-world situations where rumination or nervous system activation occur



qEEG Brain Mapping + Neurofeedback

Provider: Heather B.

Interpretation: Aya A.

Frequency: 1 Brain Map with Interpretation + 3 Neurofeedback sessions

A 19-channel qEEG brain map is included to provide objective information about the patient's brain functioning and nervous system patterns. This assessment may help identify patterns related to arousal, regulation, attention, mood, cognitive functioning, and stress response. The brain map will be interpreted by Aya Abdelhalim, M.Sc., QEEG-D, BCN-T, Board Certified Neurofeedback Specialist, and reviewed in the context of the patient's broader clinical presentation. Three neurofeedback sessions with Heather are included to introduce the patient to neurofeedback, assess tolerance and engagement, and begin supporting nervous system regulation.

Functional & Strength Training

Provider: Michael J.

Frequency: 2x per week

Personal training is included to support safe, structured movement and help the patient reconnect with her body in a strength-based and empowering way. Sessions may focus on gentle strength, functional movement, body awareness, and movement as a tool for regulation.

Acupuncture

Provider: Nicole M.

Frequency: 2x per week

Acupuncture is included to support relaxation, stress reduction, nervous system regulation, and overall physical and emotional grounding.



Care Plan Summary

Component	Frequency	Purpose
Program Oversight <i>By Karen Flannery, MD</i>	Ongoing	Physician-led clinical oversight and treatment planning
Care Coordination <i>By Jessica R.</i>	Ongoing	Scheduling, provider communication, and integrated care
Individual Therapy + Family Therapy <i>With Maggie D.</i>	1x per week + 5 hours family therapy	Emotional health, trauma, coping, and family relationships
Transformation Coaching <i>With Andrea V.</i>	2 sessions	Resilience, self-awareness, confidence, and personal growth
Nervous System Regulation Coaching <i>With Jessica R.</i>	1x per week	Emotional regulation and practical coping strategies
qEEG Brain Mapping + Neurofeedback <i>With Heather B. & Aya A.</i>	1 brain map with interpretation + 3 neurofeedback sessions	Brain activity assessment, nervous system regulation, and treatment planning
Functional & Strength Training <i>With Michael J.</i>	2x per week	Physical strength, movement, and body awareness
Acupuncture <i>With Nicole M.</i>	2x per week	Relaxation, stress reduction, and physical and emotional grounding



Care Plan Review & Integrated Recommendations

This Wellness Care Plan is designed as a 8-week intensive, assessment-informed program. At the conclusion of the intensive, Palm Beach Wellness Institute will integrate provider observations, assessment findings, and clinical recommendations into a cohesive treatment summary.

This may include:

- Summary of services completed
- Provider observations and treatment impressions, as appropriate
- Brain health findings and qEEG-based recommendations
- Neurofeedback recommendations, if clinically appropriate
- Therapeutic recommendations for continued care
- Family-system recommendations, as available
- Suggested next steps for ongoing treatment, stabilization, and support

While providers cannot guarantee specific outcomes, this intensive is designed to provide the patient, their family, and the care team with a clearer understanding of the patient's needs and a clinically informed path forward.



Your PBWI Providers



Karen Flannery, MD

Board-Certified Physician, Medical Director

As the Founder and Medical Director of Palm Beach Wellness Institute, Dr. Flannery has the privilege of treating patients, guiding families, and serving as a clinical resource for an integrated wellness team. She is dedicated to offering innovative, evidence-based care through collaborative discussions with her team of esteemed professionals.

Dr. Flannery earned her medical degree from Rush University in Chicago and completed her Internal Medicine training at the University of South Florida in 2001. She is Board Certified in both Internal Medicine and Addiction Medicine. With over 25 years of experience in hospital medicine, general internal medicine, and addiction medicine in West Palm Beach, Florida, she has also served as Chief of Staff at Good Samaritan Medical Center and is a member of the medical staff at Jupiter Medical Center.

Committed to continuous learning, Dr. Flannery has completed continuing education courses from Harvard Medical School in Psychopharmacology and Mind-Body Medicine and holds a certification in Botanical Medicine from Cornell University. Her ongoing studies include Integrative Approaches to Mental Health Care, Effective Goal Setting for Health Behavior Change, and Caregiver Burnout. She is a lifelong learner, always grateful for the opportunity to expand her knowledge base and skill set in order to best care for patients.

As a general internist with a focus in behavioral healthcare, Dr. Flannery excels in treating patients with complex medical conditions and co-occurring neuropsychological disorders such as depression, anxiety, ADHD, PTSD, and cognitive impairment. Her experience in Addiction Medicine has given her a deep understanding of habit formation, stress physiology, emotional coping patterns, and the process of meaningful behavior change. She applies this expertise broadly to help patients implement and sustain lifestyle and behavioral changes that support their overall health and wellbeing.

Dr. Flannery is recognized for her compassion, empathy, and collaborative approach. She values humility and open-mindedness in her practice and believes that greater awareness and nervous system regulation can help individuals develop healthier responses to stress and create lasting change.

Driven by a passion for helping individuals achieve sustainable improvements in their health, Dr. Flannery's work at Palm Beach Wellness Institute focuses on improving patient outcomes and promoting overall wellbeing.



Jessica R., MBA, CPT

Care Manager, Brain Health Coordinator

Jessica, MBA, CPT is the Care Manager and Brain Health Care Coordinator at Palm Beach Wellness Institute. With a background spanning wellness coaching, fitness training, and operational leadership in the mental health and substance-use treatment field, Jessica brings a unique blend of clinical coordination and holistic wellness expertise to the PBWI team.

She specializes in guiding clients through PBWI's integrated care pathways, ensuring seamless communication between providers, personalized treatment planning, and a supportive, concierge-level experience. Passionate about helping individuals create meaningful lifestyle change, Jessica is dedicated to empowering clients with structure, education, and tools that enhance both brain health and overall well-being.



Maggie D., MCSW

Psychotherapist

Maggie is a seasoned clinician with a wide range of experience in both outpatient and inpatient treatment. Committed to trauma-informed care, she provides treatment in multiple modalities, including EMDR, Experiential Therapy, DBT, and Attachment Theory. Maggie earned her bachelor's degree in psychology from Florida State University and her master's degree in clinical social work from Radford University. She is a qualified supervisor, certified in Psychedelic-Assisted Therapy, and has specialized training in

Psychodrama, the Safe and Sound Protocol, and Intensive Therapy.

Maggie's strengths include her authenticity and her ability to provide compassionate, direct, and honest reflections. She believes that early experiences shape current behavior, relationships, and worldviews. She works with clients experiencing trauma-related issues, compulsive behaviors, mood disorders, anxiety disorders, problematic personality features, and life-stage challenges. She is deeply committed to her clients' well-being.



Andrea V.
Transformative Coach

Andrea is a transformative coach specializing in relationships. She works with families, individuals, couples, and executives to overcome obstacles, rebuild trust, and create lasting change. Her programs have been featured in Palm Beach and Broward County school districts, CBS and the WB, Humanity's Team, YMCA's and the Hippocrates Health Institute. She holds certifications in Hypnosis, Neural-Linguistic Programming, Success Coaching, Health Realization, Recovery Coaching, and Recovery Coach Training,

bringing a science-backed, results-driven approach to her work. A sought-after speaker and media contributor, she blends expertise with real-world experience to create lasting change.



Heather B., E-RYT
Yoga, Meditation, & Breathwork Practitioner

Heather is a certified yoga and meditation instructor, as well as an internationally recognized Buteyko Breathing Method Instructor. With over 30 years of personal practice and teaching full-time since 2012, she specializes in helping individuals reconnect with themselves through mindful movement, functional breathing, and meditation.

Heather offers personalized sessions that draw from a range of breathwork, yoga, and mindfulness practices, tailored to each client's goals. She works with clients seeking relief from stress, anxiety, and sleep challenges, as well as those looking to improve emotional regulation, flexibility, and mobility. Heather is passionate about empowering people with practical tools they can integrate into daily life, fostering greater self-awareness, healing, and lasting transformation.



Aya A., M.Sc., Q-EEG-D, BCN-T
Brain Health Technician

Aya is a board-certified neurofeedback provider, mindfulness-based stress reductionist, researcher, and qEEG diplomate candidate. Holding a master's degree in biology with a concentration in neuroscience, Aya is committed to advancing the field of neuroscience through innovative research and non-invasive treatment modalities. Passionate about empowering individuals, Aya focuses on equipping clients with the tools and knowledge needed to take an active role in their journey to better health and

wellness. She is driven to bridge the gap between traditional treatment methods and holistic approaches by creating synergistic, individualized healthcare regimens to enhance well-being and improve quality of life.



Michael J., CPT, PES
Functional Fitness Trainer

Mike is a premier personal trainer and wellness expert, specializing in functional fitness, athletic performance, and holistic health solutions. With over 15 years of experience in the fitness industry, Mike has helped high-net-worth individuals, executives, and athletes achieve peak physical performance while seamlessly integrating fitness into their demanding lifestyles. Mike's approach to training goes beyond traditional workouts—he focuses on enhancing movement quality, building strength, and improving flexibility,

ensuring his clients excel in both everyday life and the sports they love, such as golf and tennis. His expertise extends to corporate wellness, private coaching, and luxury fitness experiences, making him a sought-after trainer for professionals looking to invest in their long-term health. Having worked with top-tier brands like Four Seasons, Mike understands the high standards of elite clientele and delivers customized, results-driven programs tailored to their unique needs. Whether through private training, group fitness sessions, or corporate wellness initiatives, his mission is to help clients move better, feel stronger, and perform at their best. A natural leader and motivator, Mike is dedicated to bringing cutting-edge fitness solutions to those who demand excellence.



Nicole M., LAc, AP, DOM
Acupuncture Physician

Nicole received her Master of Acupuncture degree from The Academy for Five-Element Acupuncture in Hallandale, Florida where she has served as a faculty member and clinical supervisor. Certified by the National Certification Commission for Acupuncture and Oriental Medicine (NCCAOM), Nicole is a member of the Florida State Oriental Medicine Association (FSOMA) and holds a current acupuncture license (L.Ac.) in the state of Florida.

Laser acupuncture is effective for nicotine craving. A special treatment using acupuncture points suppresses the urge for nicotine, whether it is through smoking or vaping. One to three treatments are recommended. Nicole is passionate about her work and strives to provide personalized care that addresses everyone's unique needs. She is a dedicated and compassionate acupuncture physician who believes in the power of Five Element Acupuncture to heal the body, mind, and spirit. Nicole understands that our bodies house a network of channels through which life-force energy flows, and that when these pathways become blocked or obstructed, it can lead to pain and disease. With years of experience in this field, she has helped many individuals unblock these channels and tap into their innate wisdom to heal from within.