



Elders Advisory Services, LLC

Trusted

Empathetic

Devoted

Checkbook management

Monthly bill pay and account oversight

Monitor checking account for unusual activity/withdrawals

Report monthly to designated family representation

Household budgeting

Develop budget

Monitor monthly expenses against budgeted amount

Communicate budget overruns to family representative

Credit card management

Inventory active credit cards

Monitor credit card activity for unusual activity, recurring charges

Close unnecessary credit cards to prevent misuse

Mail management

Open, sort, prioritize mail

Manage “junk” mail

Open and monitor email

Home management

Oversee current service providers—(i.e. lawn care, cleaning services—
to ensure services are being performed)

Assist with procurement of service providers (i.e. home repairs)

Ensure services are performed before payment is made

Financial documents inventory/review

Inventory investment accounts, including IRAs, pension plan, life insurance policies

Review titling of accounts (i.e. if accounts include the name of deceased spouse)

Review beneficiary designations and update as appropriate (i.e. if beneficiaries are deceased)

Monitor investment account activity

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Organizing documents and information needed for tax return preparation

Gather all documents necessary for tax return, including completion of
tax organizer provided by tax preparer

Assist with identifying a paid preparer as needed

Communicate with tax preparer

Legal liaison

Gather legal documents

Assist with identifying a service provider as needed

Assist with preparing for legal meetings - identifying appointees
for legal documents and summarizing legal needs

Attend meetings as requested

Evaluation of senior living alternatives

Research in home care providers

Research senior living alternatives

Accompany family members to meetings with potential care providers

Final arrangements pre-planning

Identify/evaluate providers

Attend meetings with providers

Evaluate cemetery alternatives

Notary services

We customize our services to meet your needs.