DAILY MONEY MANAGEMENT SERVICES

PERSONALIZED ATTENTION FROM EXPERIENCED PROFESSIONALS

The services we offer are tailored to those who understand the opportunity costs associated with managing their own routine financial tasks. Our clients receive personalized attention from experienced professionals who will devise the best plan for you at the most cost-effective fee.

Warren Averett offers strategic and coordinated daily money management services to families, high-net-worth individuals, busy or retired executives and senior adults by developing a customized plan to fit specific financial situations.

Our team is here to serve clients of all ages. Athletes and Trust Beneficiaries often need assistance with managing sudden wealth. They may travel frequently and not have the time or energy to handle routine financial matters. Their desire to build good financial habits and assist family and friends can be fulfilled by entrusting our team of experts with their daily money management goals.

Time has become a very expensive commodity. Busy executives who want to maintain a burden-free lifestyle may not have the time to properly manage their multiple personal banking and investment accounts. By allowing our team of professionals to handle their financial affairs, they will gain valuable time to pursue other worthwhile goals.

Retired executives who are accustomed to having an assistant handle their personal matters are also well-suited for our services. Retirees want the time and freedom to travel, visit family and friends, volunteer, do philanthropic work or just relax.

By utilizing our specialized services, the retired executive can eliminate the worry and burden of handling personal finances.

Senior adults who want to maintain an independent lifestyle and quality of life can also benefit from the compassionate and personal attention we provide. Children caring for their aged parents also want assurances about their parents' financial well-being. We strive to ensure that financial matters are taken care of in the most secure manner.

CSA This division is managed by a Certified Senior Advisor

SERVICES

Our team provides a highly specialized service that requires us to meet with each individual to develop a comprehensive service plan. This helps ensure that financial goals are met. Some of our services include:

Expense Management

- Bill payment and deposit of receipts for multiple properties
- Record keeping help with all banking and financial transactions
- Bank and investment statement reconciliation

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- Reporting of monthly financial activities
- Organizing of ledgers for year-end tax preparation

Oversight and Assistance

- Mail receipt and sorting
- Review of credit card and checking account statements for unusual activity
- Client alerts for account activity fluctuations
- Paperless storage of all invoices received and expenses paid
- Evaluation of insurance coverage and recommendations for additional coverage, such as long-term care insurance

"Allocating time to handle my personal financial matters can be difficult, between my law practice and spending time with family. The Warren Averett Daily Money Management Service team created a personal financial plan for my household, and, with their help, I am able to free up more time to spend doing the things that are most important to me."

— Client of DMMS

OTHER SERVICES DAILY MONEY MANAGEMENT PROVIDES OUR CLIENTS:

- Payroll services for domestic or small business employees
- Medical claims processing and follow-up
- Cash flow planning and projections
- Liaison between client and financial institution, vendors, etc.

To learn more about our services and how we can create a personal financial plan for your situation, visit the Daily Money Management Services page at www.warrenaverett.com or call us at 800.759.7857.

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