

YOUR PERSONAL FINANCIAL CONCIERGE

You've worked hard for your lifestyle, but building businesses, owning multiple properties, managing planes and yachts, and traveling the world can create a logistical puzzle for managing the minutia of your financial details. Warren Averett Daily Money Management Services can give you more time to enjoy the important things in life.

Our team will develop a comprehensive plan specific to your unique situation that allows you the freedom to do what's most important to you—without the burden of managing the day-to-day financials. We commit to learning your personal preferences, lifestyle and goals so that we can support them with our advisory insight.

Have confidence that your services are as credentialed as they are convenient. DMMS is led by a

**CERTIFIED DAILY
MONEY MANAGER and
CERTIFIED SENIOR ADVISOR**

EFFICIENCY THROUGH TECHNOLOGY

Access our team's real-time monitoring and coordination for up-to-date insight. When your finances are met with the convenience, accuracy and

efficiency of our tools and expertise, you can leverage more opportunities when it counts.

ULTRA-PERSONALIZED SERVICE FOR HIGH-NET-WORTH INDIVIDUALS

Our team serves many different clients, including professional athletes, trust beneficiaries, executives, entrepreneurs and families of generational wealth. Beyond the specific services our advisors offer, our team is experienced in supporting individuals and families of high net worth who desire to build good financial habits, want to maintain a burden-free lifestyle or need assistance with managing sudden wealth. We take the time to get to know you and your goals, and we adapt our approach and style to your needs and preferences.

CONVENIENT FINANCIAL INSIGHT WHENEVER YOU NEED IT

Your life is always changing, and your wealth is always growing, which is why your advisor is constantly available to you. If you're traveling abroad, if you're building a business empire, if you're making financial decisions for your children, or if you're considering purchases and investments, questions can't always wait. Your single point of contact on our team will be responsive to your calls and will leverage current technology to offer you the most valuable advice at the right time.

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OUR SERVICES RUN THE GAMUT FROM PERSONAL AND LIFESTYLE MANAGEMENT SUPPORT TO ACCOUNTING AND TAX SERVICES

- Bill payment and deposit of receipts for multiple properties
- Recordkeeping help with all banking and financial transactions
- Bank and investment statement reconciliation
- Reporting of monthly financial activities
- Organizing of ledgers for year-end tax preparation
- 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
- Payroll services for domestic or small business employees
- Medical claim services
- Cash flow planning and projections
- Liaison between client and financial institution, vendors, etc.
- Assistance with Social Security and Medicare enrollment
- Management of vacation homes and rentals
- Assistance with purchasing/selling homes and automobiles
- Bank and credit card dispute resolution



"As someone who travels extensively and runs many businesses, it was important to me to have someone I can trust to have my best interests in mind and handle the day-to-day issues. DMMS does just that! Their staff has truly become an extension of my family. They not only pay my bills, but they also help me to better communicate with those in my personal circle such as my staff, lawyers and even medical professionals. They have stopped at nothing to help me with things "outside the box" such as last-minute travel arrangements or electronic payments outside of normal business hours, and they always have my back."

— Ben Twigden

Co-Owner at Twigden & Meyer Custom Homes,
Twigden Properties and Twigden Realty



Get started on a personal financial plan tailored to your unique situation and desires by visiting the Daily Money Management Services page at www.warrenaverett.com, call us locally at 334.260.2224 or call us toll free at 800.759.7857.