

## MANAGING YOUR PERSONAL LIFE, PROFESSIONALLY

Do you want more time to enjoy your retirement? Or could you use help managing your finances or creating a budget?

### WE CAN HELP.

Warren Averett's Daily Money Management Services Team offers strategic and coordinated managed services to individuals and families by developing a customized plan to fit their specific lifestyles and financial needs.

Our dedicated team is here to serve and assist clients of all ages as they transition through life. **Young athletes, entrepreneurs and trust beneficiaries** often need assistance with managing sudden wealth. They may travel frequently and no longer 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 professionals 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 aging 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 comprehensive and highly personalized services. We meet with each individual to help ensure their unique goals are met. Some of our services include:

#### Expense Management

- Bill payment and deposit of receipts
- Monthly bank and investment statement reconciliation
- Payroll services
- Medical claim services
- Cash flow planning and projections

### Oversight and Assistance

- Mail receipt and sorting
- Insurance coverage evaluations and assessments
- Investment transaction and statement analysis
- Monthly reporting of financial activities
- Client alerts for unusual activity or account fluctuations
- Organized ledger for year-end tax preparation
- Serve as liaison between clients and their financial institutions

“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



OUR TURF IS EVER EXPANDING  
TO HELP YOU  
THRIVE IN YOURS

For a current list of locations,  
visit [warrenaverett.com/offices](http://warrenaverett.com/offices)

### CONCIERGE SERVICES:

- > Planning and booking travel accommodations
- > Managing vacation homes and rentals
- > Assisting in the purchasing/selling of homes and automobiles
- > Assisting seniors with Social Security and Medicare enrollment
- > Banking or credit card dispute resolution

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](http://www.warrenaverett.com), call us locally at 334.260.2224 or call us toll free at 800.759.7857.