



# Personal Money Management

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161 Northfield Road  
Northfield, IL 60093

Our experienced Personal Money Managers are available to help older adults and their families with a wide variety of financial tasks. We offer financial expertise and secure data handling that can help deter fraud and abuse. There is a fee for this service.

## Basics

- Pay bills
- Manage mail
- Monitor/reconcile accounts
- Organize records
- Verify medical claims

## Specialty

- Financial analysis for housing decisions
- Coordinate with elder care specialists
- Support and assist Powers of Attorney, trustees, and executors

## Tax Organization

- Gather documents
- Itemize deductions
- Coordinate with CPA
- Pay annual and estimated taxes
- Maintain records

## Financial Reporting

- Prepare budgets
- Prepare quarterly and annual reports

**north shore senior center**

Member of  
**AADMM**  
American Association of Daily Money Managers

North Shore Senior Center does not discriminate against any person served, person employed, or person seeking employment based on age, sex, race, color, disability, ethnicity, national origin, genetic information, religious tradition or spiritual practice. If you feel that you have been discriminated against, call the Senior Help Line at 800.252.8966 or 888.206.1327 (TTY).