

CLIENT SERVICES:

Elder Care

Dear Client:

As your cherished family member gets older, they may need some help with their day-to-day financial tasks. Ordinarily simple tasks such as balancing a checkbook and paying household bills become increasingly difficult for the elderly.

You could take care of their day-to-day financial tasks yourself, if you have the time and live close. But if you don't, you may want to consider hiring a professional to help.

With our elder care services, you get the help of a caring, honest and knowledgeable professional. Someone on your team, looking out for your parents or grandparents best interest.

Your loved ones get assistance with their daily finances and business duties and you are kept informed of every step we make. That way, you always know that your family member's needs are being met.

Whether your loved one is no longer entirely independent or simply needs extra help to enjoy their lives, you get help in any of the following areas:

- Reviewing and paying household bills, budgeting, and record keeping.
- Assistance with check writing and checkbook balancing.
- Making sure money is received, receipted, and deposited.
- Offering second opinions regarding household issues and unexpected situations.
- Handling day-to-day financial transactions such as home repairs, routine maintenance, and emergency medical expenses.
- Planning retirement account distributions and safeguard against improper disbursements.
- Organizing and reviewing personal, financial, and legal documents to determine what needs to be addressed.
- Preparing an inventory of personal assets and investments.
- Identifying and planning their retirement income, needs, and goals.
- Determining current and long-term cash flow needs by analyzing income and expenses.
- Addressing questions about lifestyle, Social Security, pensions, Medicare, and long-term insurance.
- Monitoring investment portfolio and other assets in conjunction with their investment advisor.
- Preparing, planning, and filing income, trust, gift, and estate tax.
- Providing referrals to local services and agencies.
- Arranging proper level of care, transportation, and caregiver assessment.

Planning for the future is important, and elder care services are crucial to help your elderly family members maintain their independence and financial freedom.

Sincerely yours,

TICE ASSOCIATES, P.C.

1709 W. Market St. York, PA 17404

Phone: 717-843-9572

Fax: 717-845-1590

Web: www.ticeassociates.com