

What you get:

confidence

to manage your finances with ease

stress relief

so you can stop worrying about how to accomplish financial goals

peace of mind

that you have a workable game plan in place and someone to turn to for assistance when needed



Learn more about our services!
www.TeamSimplify.com

480.526.7909

DO YOU...



...misplace important papers and want to get organized?



...sometimes pay bills late?



...need help creating a budget?

We can help.



Call us today
and simplify your life!

• Ask about our Technology services if you need help learning computer skills or using your iPad or other mobile device.

adapt

With each new chapter in our life, we often adapt our lifestyle to reflect the new pace. Likewise, our financial picture also needs to adapt.

plan

This requires developing a plan to work in a simplistic manner. Gathering records and papers can be streamlined to work more efficiently for your review, as well as for your tax preparation and estate planning.

simplify

A well-designed process creates transparency, enabling one with any skill level to carry out the simplified financial program.

Managing your **HOUSEHOLD FINANCES** just got easier.

Streamline finances

organize tax records

\$80 – \$160

streamline financial process

\$240 – \$400



What we'll do:

1. Review your financial process and suggest simplification.
2. Quicken setup
3. Checkbook/bank statement reconciliation
4. Organizing personal papers for your estate planning and end-of-year tax information for your tax return preparation
5. Managing cash used for daily purchases and transactions (designated legal authority may be required)
6. Set up, review, update budgets
7. Long term care preparation
8. Medical Claim filing/reimbursement
9. Tutoring on how to avoid fraud
10. Organizing records
11. Assist with bill pay
12. Assist with after death checklist