

My Recent Projects:

- ◆ **Bill paying, managing financial paperwork and follow-up** for a visually impaired senior (who would rather be enjoying his new granddaughter).
- ◆ **Work with a client's attorney to wrap up her husband's estate** and help simplify household finances and paperwork for the widow (who would rather take a much-needed vacation).
- ◆ **Set up a home office and "paper flow" system** for a teacher and entrepreneur (who would rather spend time on her career and hobbies).
- ◆ **Provide peace of mind** to the family of a man with dementia who can no longer handle his finances, do paperwork, and submit insurance claims (who would rather be painting).

Past President, Greater NY Chapter

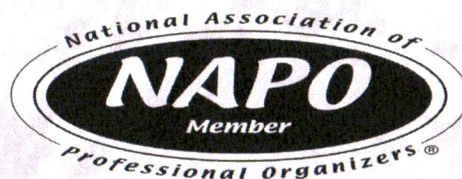
AMERICAN ASSOCIATION OF



DAILY MONEY MANAGERS

www.AADMM.com

*Golden Circle Member
Leader, Working with Seniors SIG*



The Organizing Authority®

www.NAPO.net

*Board Member
Rockland Co. Estate Planning Council*



www.RocklandCountyEPC.org

Personal Money ManagerSM

Karen Caccavo

*~ Paperwork, Bill paying
... Peace of Mind ~*

*Envision
an
Organized
Financial
Life*

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As a trusted professional,
I work along side you:

- I earned my **MBA** at the **Wharton School** and have over 35 years in the field.
- I am a bonded and insured member of the **American Association of Daily Money Managers** and **National Association of Professional Organizers** and commit to both organizations' **Code of Ethics**. (*Ask me for copies.*)
- I'm quoted in **The Wall Street Journal**: <http://www.wsj.com/articles/when-aging-parents-need-help-with-financial-tasks>

What my clients say:

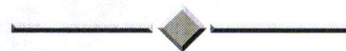
"Who is Karen? She's my lifesaver!" ~ JTH, age 80

*"Thanks to you, **for the first time in my life** I understand my finances." ~ ZWC, age 40*

*"Hiring you was the **best** thing my mom could have done for herself **and** for us." ~ RW, daughter of MW, age 89*

I can do the
"desk work"
you hate doing:

- **Arrange** your workspace and files for efficiency
- **Review and pay** bills or set up an easy-to-use bill paying process
- **Manage** checkbooks and credit card accounts
- **Organize** tax and financial documents
- **Uncover** billing errors and identify potential cost-savings
- **Work** with your attorney, financial planner/broker, and accountant
- **De-clutter and de-stress** your workspace and life!



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Who needs
Personal Money
ManagerSM?

- ❖ People who would rather not do daily paperwork and follow-up
- ❖ People suddenly taking on new financial responsibilities (widows/widowers/divorcees)
- ❖ Trusted advisors whose work depends on clients completing their paperwork
- ❖ People who lack the ability (or interest) to track and pay bills
- ❖ People with health issues or disabilities that make managing and organizing paperwork difficult
- ❖ Executors, POAs, and trustees
- ❖ Family caregivers concerned about disabled or aging loved ones
- ❖ You, your loved ones, or your clients