

Personal Money Management Services Include:

- **Bill Payment & Management**
Automate, sort and pay bills; balance bank accounts and update registers; monitor for fraudulent charges; coordinate with wealth managers, financial planners, and estate planning attorneys.
- **Budgeting & Expense Tracking**
Create a system that tracks all monthly income and expenses, including monthly and yearly reports; establish and maintain budgets.
- **Document & Tax Organization**
Set up a filing system to organize the piles of mail and papers; organize tax papers for the CPA/accountant; ensure estimated taxes are paid each quarter.
- **Estate & Insurance Management**
Organize estate assets and documents; medical expense tracking; arrange, file and track claims
- **Custom Services**
Buying a second home, moving to a new community, losing a spouse and other major life changes.

C. Dolan & Associates' all-inclusive financial organizing and money management services will give you back your time and relieve the stress and worry about all of your bills, piles of mail and paperwork, insurance claims, tax preparation, etc.

My goal is to put my clients at ease knowing someone they trust is helping them navigate these challenges and looking after their fiscal well-being.

Relax and let us handle your financial paperwork with our personalized, in-home money management services.