



Adult & Elder Services

Financial Maintenance
Asset Preservation
Planning Services
Complete Care



A Comprehensive Approach to Providing the Services You Need

www.AECares.com



Adult & Elder Services



BILLS household help
 PLANNING **HEALTH CARE**
 Budgeting **FINANCES** taxes
 INSURANCE
 HOME MAINTENANCE
 HOUSING INVESTMENTS

*As we get older,
 we need assistance.
 Plan for that
 help now, **before**
 it's needed.*

If you are uncertain about your plans for the future, now is the time to get help.



“We need help managing our finances.”



“I’m concerned about maintaining my independence.”

Everyone can use help managing their affairs!

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Adult & Elder Services

Financial Maintenance

We manage our clients' routine financial obligations and monitor their budgets to ensure their finances are kept in good order.

- Manage expenses and pay bills
- Prepare budgets and manage cash
- Gather tax information and prepare returns
- Manage health insurance benefits and claims

Asset Preservation

With our expertise in financial management, we work with our clients' attorneys and investment advisors to preserve and protect their assets. When needed, we also help identify new advisors.

- Asset protection strategies
- Evaluate insurance options
- Coordinate investment advice
- Monitor investment and trust activity

Planning Services

We work closely with our clients to identify their goals, develop plans to achieve them and monitor their progress to make sure their wishes are fulfilled.

- Financial, estate and tax planning
- Medical and advocacy planning
- Coordinate legal matters with attorneys

Complete Care

For some clients, we are entrusted to look after all of their needs. We customize a plan that ensures their needs are met and maintains their independence.

- Manage household expenses
- Hire and coordinate personal care
- Periodic visits and reports to family
- Arrange for geriatric care management
- Act on client's behalf when the need arises
- Coordinate needs assessment and services with family and care providers





Adult & Elder Services

Whether you need assistance or it's a friend or relative who you are concerned about, we can help.

Our training and expertise make us uniquely qualified to identify and deliver the services you need. Our fees are based on the time we spend working for you.

Adult and Elder Services are provided by a division of A&E Business Advisors, Inc. which was founded in 1992 to provide accounting, tax, financial management and planning services.



Call us today so we can start to make a difference for you.

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