

# Services

## Services we provide:

- Act as liaison between clients, families, and community resources
- Review mail
- General organizational and filing assistance
- Pay bills
- Budgeting
- Plan for Savings
- Monitor medical bills and submit insurance claims
- Identify and resolve billing errors
- Banking
- Power of Attorney as necessary
- Create financial reports
- Organize tax documents
- Refer you to legal, tax and investment professionals
- Assist families and professionals with filing applications for
  - Medicaid
  - Medicare Part B
  - Nursing homes
  - Refinancing