

Engaging a Team of Senior Specialists

Whether helping your elderly parents or making plans for your own senior years, consider consulting professionals who can help you with financial, health care, legal, insurance, and other life planning, decisions, and preparations.

PROFESSIONAL	HOW THEY CAN HELP	WHERE TO LEARN MORE
Accountant	Payroll for private-pay home health aides; tax preparation	American Institute of CPAs (AICPA)
Daily Money Manager	Bill paying; balancing checkbooks; budgeting and annual expense planning; document management; insurance claims and reviews; liaison with Medicare, Social Security Administration, accountants, attorneys, bankers & reverse mortgage officers, financial managers, geriatric care managers, insurance brokers, and more	Eddy & Schein Group American Association of Daily Money Managers
Elder Law Attorney	Long-term care planning and implementation; preparation of critical documents	National Academy of Elder Law Attorneys, Inc. (NAELA)
Financial Advisor	Investment management (often affiliated with an investment firm)	The National Association of Personal Financial Advisors (NAPFA)
Financial Planner	Investment advice	Financial Planning Association (FPA)
Geriatric Care Manager/ Aging Life Care Professional	Assessing, hiring, and/or supervising of home aides; medical care coordination	Aging Life Care Association

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Generational Coach or Family Mediator	Help with talking to parents or with building a strategy among siblings to work together with parents	International Coaching Federation (ICF) Academy of Professional Family Mediators (APFM)
Geriatrician	Coordinate health care	American Geriatrics Society
Handyperson	Small home maintenance jobs and coordination of larger projects	Association of Certified Handyman Professionals (ACHP) United Handyman Association (UHA)
Home Health Aides	Health care in senior's own home. (See Geriatric Care Manager above.)	Aging Life Care Association
Insurance Broker	Private-pay home health aide workers coverage; long-term care insurance; re-evaluation of home, auto, life insurance	Insurance Information Institute
Professional Organizer	Clearing out residential clutter, downsizing, or relocation	National Association of Productivity and Organizing Professionals (NAPO) National Association of Senior Move Managers
Trusts & Estates Attorney	Estate planning, wills, POAs, health care proxies, and other critical documents	Your state's Bar Association website

Eddy & Schein Group offers [LifeKeeping](#) – personalized financial organization and administrative services for seniors, their adult children, and adults with special needs.

If you, or someone you know, could benefit from having a Personal Finance Manager, please contact Eddy & Schein Group for a **free phone consultation**.

Visit our [website](#) or call us: [New York 212-987-1427](#) or [California 917-881-7042](#)