

Why You May Need a Personal Finance Manager

When life situations become more challenging and stressful, a Personal Finance Manager's services and support can be beneficial and reassuring – whether it's working on an isolated project or in a long-term capacity. But, often life has to give people an extra push before they'll ask for help.

The triggers that might inspire someone to call a Personal Finance Manager often seem mundane and not worth involving another person. However, these issues can be like the tip of the iceberg, indicators of major underlying problems such as cognitive dysfunction, undiagnosed physical health issues, chronic disorganization, or the beginnings of hoarding.

What finally inspires people to seek assistance? Here are some examples:

- I have a mound of papers on my dining room table, and I cannot seem to get through them.
- My attorney/financial advisor needs documents and I cannot find them.
- I need to get documents from government agencies and don't know where to start.
- Checks are bouncing, but I know I have money.
- My investments are very confusing.
- I don't have legal documents like a will, POA, HCP, etc., and need to see my attorney, but I'm not sure how to collect all the necessary information.
- I don't have anyone to be my Power of Attorney/Health Care Proxy/Executor.
- My spouse or partner passed away and he/she handled all our finances. Now I don't know what to do.
- My hands are cramping when I write so it is hard to complete tasks I used to do easily.
- I have failing eyesight and can't see well enough to handle my bills and paperwork.
- My parent has cognitive impairment and is losing papers and bills, and is forgetting to write and mail checks.
- I have insurance claim problems and cannot get them straightened out.
- I wish I could take care of my parents' affairs, but...
 - I live too far away
 - I have a demanding job
 - We don't get along
 - My parent is suspicious of me
 - This is not my strength

- I was assigned as agent under a Power of Attorney, but I don't have the time to take this on.
- My mother passed away, and I'm the executor. I need to go through all her papers and identify her assets, whether she had life insurance, and what bills need to be paid or stopped. This is a huge short-term job, and it has to be done immediately.

Eddy & Schein Group can help with your personal finance management challenges.

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**