



## What is a Daily Money Manager?

A daily money manager (DMM) is a professional who provides a wide range of personal business assistance to clients who want help managing their day-to-day monetary affairs. DMMs often organize and track financial and medical insurance papers, pay bills and maintain bank accounts.

A daily money manager can save you time and hassle, and can negotiate on your behalf. We can refer you to other professionals such as lawyers, investment advisors and personal care providers which will ultimately simplify your life.

## Typical Clients Include

- ❖ Senior citizens
- ❖ Adult children
- ❖ Busy professionals
- ❖ Small businesses that choose professional attention for their bookkeeping and record needs
- ❖ Individuals who travel frequently for business or for extended periods of time
- ❖ Individuals undergoing significant life events or changes (loss of loved one, divorce, etc.)

## Services Provided

- ❖ Bill paying
- ❖ Day-to-Day banking
- ❖ Budgeting
- ❖ Medical claims management & insurance paperwork
- ❖ Financial records organization
- ❖ Income tax records and receipts organization, in preparation for annual filing
- ❖ Prepare & file income tax returns & all other accounting needs

## Testimonials

“When my aged mom could no longer remain independent, I blindly had to take on the responsibility of her financial affairs. Mom had been using Fylstra & Fylstra, LLC who I contacted. Bob & Lori Fylstra went above and beyond the services I expected; taking time to walk me through the questions concerning state and federal taxes. Post tax time they continue to contact me insuring that the financial obligations continue to be addressed. Their services have the human touch; not only efficient but thoughtful.”

*Paulette C.*

“We use Fylstra & Fylstra, LLC for our businesses bookkeeping services as well as for tax filing and tax advice. They always provide excellent and efficient service.”

*Doug B.*

“For over 20 years I have been very secure and satisfied with Bob Fylstra. Fylstra & Fylstra, LLC are a blessing for all of us who don't keep strict records. Twenty years of Blessings!!!”

*Joyce Marion J.*



*Our mission is to assist individuals, families and businesses in the day-to-day management of their accounts. Our focus is on the peace of mind our clients will have when their financial obligations are met with professionalism, ethics and confidentiality.*

**Fylstra & Fylstra, LLC**  
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## **Fylstra & Fylstra, LLC**

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**Daily Money Managers  
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