



FISCALLY BALANCED®

YOUR DAILY MONEY MANAGER

We understand that money matters are very personal. We also understand that the lack of ability, knowledge, time or even desire can make daily financial responsibilities daunting for many people. Our focus is financial organization and tasks. Shouldn't your focus be on the areas of life that bring you joy?

Fiscally Balanced® can take the burden of organizing financial paperwork and help with daily financial tasks by becoming your personal CFO. We tailor our approach to help only where help is needed as one-time support or on-going assistance. We perform most of our work remotely, but some situations or tasks may need to be handled in-person.

Contact us for your complimentary consultation.

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INDIVIDUALS | FAMILIES | ADULT CHILDREN | SENIORS
| BUSY PROFESSIONALS | TRAVELERS | PEOPLE IN LIFE
TRANSITION | FIDUCIARIES | SMALL BUSINESSES

Budgeting & Spend Analysis Services

- Individuals or families looking for a better financial trajectory
- Individuals who recently lost a spouse or divorced and historically didn't handle personal finances in the household
- Newly married couples seeking a game plan to merge finances
- Busy professionals in need of categorizing expenses for decision making or tax purposes
- Anyone in need of a sounding board to assist with personal financial decisions

Bill Payment Services

- Adult children in need of assistance for a parent with dementia
- Individuals or families dealing with a recent illness or disability and in need of additional support
- Individuals who recently lost a spouse or divorced and historically didn't handle personal finances in the household
- Individuals named as trustee, executor or financial power of attorney in need of additional support
- Busy professionals or frequent travelers that lack time to devote to their personal finances

Fiduciary Services

- Individuals or families lacking someone to name in their estate planning documents as trustee, executor or financial power of attorney
- Individuals or families wanting to prevent the burden on other family members of managing their financial affairs of their estate

Small Business Services

- Small businesses looking for assistance with managing business finances
- Small business owners looking to separate business expenses from personal expenses
- Small businesses looking to implement or transition to a new accounting system



- ✓ Background Check
- ✓ Standards of Practice
- ✓ Code of Ethics