FISCALLY BALANCED

YOUR DAILY MONEY MANAGER

Covered up in piles of bills and mounds of paperwork? Need help? I can take the burden of organizing financial paperwork and help with daily financial matters.

My clients include those experiencing life transitions such as marriage, divorce, or loss of a loved one, and individuals or families wanting a different financial trajectory for their life. Additional clients include busy professionals, seniors, and those with a disability or experiencing illness. I stand ready to assist you or a loved one for a one-time need or an on-going basis.

Contact me for your complimentary consultation.

PAULA K. CANADAY-DAEKE
706.927.8659
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FISCALLYBALANCED.COM

Manage your financial obligations

Review mail

Reconcile any discrepancies on financial, medical and insurance statements or bills

Pay bills

Track expenditures

Negotiate with creditors

Make bank deposits

Automate bill payment

Analyze your historical finances

Prepare spend analysis

Prepare cash flow analysis

Prepare net worth statement

Prepare asset inventory report

Prepare debt analysis report

Review, analyze and consolidate financial accounts

Review, research and negotiate consumer products and services

Review credit report

Organize financial documents for estate finalization, tax preparation and beyond

Plan your financial future

Setup a personal record keeping system and organize financial, medical and legal documents

Create a budget / spending plan

Devise a strategy for spending or debt reduction

Recommend suggestions for improving credit score

Develop savings strategy

Discuss financial goals and formulate a plan to meet those goals

Refer to or meet with accountants, financial advisors, insurance agents, attorneys or other professionals

Member of AADMM American Association of Daily Money Managers

BACKGROUND CHECK CLEARED 2018