

ELDER CARE MONEY MANAGEMENT PROGRAM

ElderCare is a money management program for older family members provided by the professional team at J.L. Cohen & Associates, Ltd. ElderCare allows older family members to maintain an independent lifestyle supported by the direction and guidance of an experienced Certified Public Accountant. This guidance extends beyond required financial services to include an array of other personal needs.

The firm plays the role of advisor, consultant, friend, and even extended family member, to ensure the quality care of our client or your family's elder members.

FINANCIAL SERVICES AVAILABLE

A primary concern with the elderly is their financial security. Whether they are living independently or with help from family members, protecting their financial stability is always a major goal. To support financial soundness, we offer the following services:

- Tracking revenues
- Processing and paying bills
- Depositing funds
- Overseeing general expenditures
- Planning for emergency costs
- Reviewing investments and estate finances
- Filing tax returns
- Paying caregivers
- Participating in financial planning discussions with the client and other family members

PERSONAL SERVICES AVAILABLE

We make it a policy to go the extra step for our clients. With ElderCare, we continue this commitment. Our firm offers services intended to offer peace of mind concerning the level of care a client is receiving. We review or supervise the following personal services to ensure that they are sufficient for the client's needs, and we are poised to make changes as appropriate:

- Medical treatments
- Household maintenance
- Meal preparation
- Transportation
- Social services coordination

Your J.L. Cohen & Associates, Ltd. CPA is the point of contact to ensure that the client or your family member is properly assisted with independent living.

FURTHER INFORMATION

If you are interested in finding out more about our Eldercare program and its services, please call us at 610.258.0819. One of our professionals will meet with the client and/or the family members to discuss options and set-up requirements. Specific needs and services will be reviewed and planned. Networking opportunities with care providers and agencies for the elderly can also be coordinated.

A budget will be developed based on the selected services and a plan to implement these services will be designed. The plan will include details for all options selected -- whether tracking revenues, making deposits, paying caregivers, arranging for visiting nurses, ordering medical supplies, and more. The plan will also include standards for evaluation of services as well as future objectives.