

# Do You Have All Your Financial Organizing Bases Covered?



Managing your bills, categorizing items, insurance claims, tax documents—monthly income and expenses can be stressful!

**Organizing your financial information in these three buckets is a good start:**



## **CHRISTINE DOLAN**

I am a Daily Money Manager with a passion for assisting clients who are very busy, or who are overwhelmed managing their financial matters. I have an MBA and more than 20 years of experience.

### **BILL PAYMENT & MANAGEMENT**

- Automate, sort and pay bills
- Balance all bank accounts and update registers
- Monitor for fraudulent charges

### **BUDGETING & EXPENSE TRACKING**

- Create a system that tracks all monthly income and expenses, including monthly and yearly reports
- Establish and maintain budgets

### **DOCUMENT & TAX ORGANIZATION**

- Set up a filing system to organize the piles of mail and papers
- Organize tax papers for the CPA/Accountant

*Let C. Dolan & Associates help navigate and organize your financial paperwork to restore peace of mind.*

**SCHEDULE YOUR FREE CONSULTATION TODAY**