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## Too Busy to Mind Your Own Business?

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Life gets complicated sometimes. There are too many things to do, too many places to be, too many people to spend time with. Managing your business affairs may not make it to the top of this list. If you're not so good with complex financial matters, why put yourself through the aggravation? And even if you are, managing them may not be the best way for you to spend your time. There's the old story that the best carpenter in town couldn't afford to do his own carpentry, because he was also the bank president. You may face similar choices in how you allocate your scarcest resource: time.

Imagine what would be possible if you could get a trusted advisor to handle most of your financial matters.

Consider Family Financial Services from Adelman Katz & Mond. For a monthly fee, we can help you:

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- ❖ **Pay your bills.** Time is money, and bill payment and tracking takes plenty of both. Is it really worth the added cost of your time to do your own bill payments?
- ❖ **Reconcile your checkbook and accounts.** This is another time-consuming, laborious task. For many people, it's also anxiety-provoking, so they procrastinate. Wouldn't it be worth having a clear understanding of how much you really have and where you're spending your money?
- ❖ **Handle your insurance claims.** Insurance companies look for specific things and scrutinize for discrepancies before they pay out. And you may have to file a claim multiple times before it's finally paid. Do you have the expertise and/or time to navigate the hurdles and get resolution quickly?
- ❖ **Monitor your investments.** Your investment strategy might be very sound, and your portfolio manager might be following your instructions closely. Or maybe not. Is it possible you could benefit from an independent review by someone whose only interest is your interest?
- ❖ **Evaluate your insurance coverage.** Life is a risky proposition, so insurance – life, medical, disability, liability, long term care, property and casualty – has become an absolute necessity. Getting the right combination of policies to keep you properly insulated from risk isn't simple.

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- ❖ Who has the expertise to make sure there are no gaps in your coverage, no matter what you're doing, no matter where you are in the world?
- ❖ **Keep your estate current.** Estates are not just about death; they're also about taxes, health care proxies and other complex, interlocking concepts and

documents. Your will, health care proxies and durable power of attorney need to be current and flexible enough to accommodate changes in the tax law. Do you want to worry about all the risks of keeping an incomplete or outdated estate package?

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Family Financial Services relieves you of the tedium of day-to-day management of your financial affairs, so you can spend your time doing more important things – like enjoying your family, building on your successes and meeting your work commitments.

It also relieves you of hassle and worry. We understand how to do these things right. We should; we've been helping our clients manage their affairs for over 40 years. And our primary business is accounting, so you know you can trust us to take a straightforward, bottom line-oriented approach. Of course, we'll also track your information for tax purposes, so you won't have to worry about that, either.

Find out more about whether our Family Financial Services are the right choice for you. Call us today at 212.382.0404

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Adelman Katz & Mond aims to be our clients' most trusted business advisor. To earn that trust, we work hard to improve on our own expertise, which has been honed over 40 years. And to cover all the bases, we build successful collaborations with other professionals – including attorneys, bankers, investment managers and insurance brokers. We invite you to find out more about the benefits of having us on your team.