

For Peace of Mind

Secure Aging adheres to the highest ethical standards. We protect seniors' self-determination and dignity through straight-forward, meticulous and trustworthy financial care management.



Reba Rogers, CPA
President

It's the desire of all seniors to remain independent. We can help by giving them financial peace of mind. We track and monitor their income sources to be sure they are correct and on time. We review, pay, mail and track their bills and reconcile their bank accounts. Being familiar with the many resources available to seniors in our community and nationally, we offer valuable, cost-saving recommendations. Our services help protect seniors from unscrupulous con artists looking to exploit the life savings of the elderly.

We fully coordinate and communicate with family members (especially those out of town) and with other professionals involved in our clients' lives such as financial advisors, attorneys, insurance agents, healthcare providers and facility staffs to improve quality of life.

"Thank you so much. You are a pleasure and a joy to work with; we can't thank you enough for the wonderful support you provide Mom and the family."

- Lloyd, son living in Australia

"You have truly been a godsend. I really appreciate these amazing updates... It sure sounds like you're driving great solutions to the many issues he's running into. It really makes a difference when he's working with an expert in all these topics vs. with family members who have our own biases!"

- Kim, daughter living in Ohio



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Helping Seniors and Their Families Navigate Life's Changes

Tracking and Monitoring of Income Sources

Assisting With VA, Medicaid or
Other Benefits Applications

Reviewing, Paying, Mailing
and Tracking of Bills

Reconciling Bank Statements

Advocacy and Assessment



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How we can serve you...

Secure Aging offers three packages designed to meet your current needs. Initial consultations are free. The average price is based on \$75 per hour. We will provide a cost estimate after meeting with you and determining the level of service required and the number of hours needed each month.

BASIC SERVICE PACKAGE

(Average Price Range: \$75-\$150 per month)

Our basic service is for the senior who simply needs a little assistance to:

- Review bills for accuracy and pay them on time
- Deposit income into bank accounts
- Review the voluminous amount of mail received.

Seniors who typically benefit from this level of service are those who are paying bank fees for insufficient funds or late fees and interest charges on their credit card balances. We find that by sorting the mail for scams and solicitations, we protect our clients from



unnecessary expenses. The savings realized from eliminating these fees will typically cover our fees and provide a little extra spending money to our client.

ENHANCED SERVICE PACKAGE

(Average Price Range: \$150-\$300 per month)

Our enhanced service package is for the senior who needs a little extra assistance because he or she is vulnerable to financial predators or has been scammed in the past. In addition to the services in the previous package, we will also:

- Monitor bank and credit card activity for fraudulent activity
- Report and follow up on fraud
- Develop budgets and manage cash flow
- Assist to consolidate client assets or help with debt consolidation and pay off.

Seniors who typically benefit from this level of service are those who have a variety of income sources and investments and are vulnerable to scams which could deplete those assets.

We are finding that financial predators are very devious in convincing or scaring our senior clients into giving them access to their bank and investment accounts. We have successfully protected our clients from this type of exploitation with our enhanced service package.

"It's really difficult living 1,200 miles away from her. You make it a lot easier knowing that a person of your nature is involved in our grandmother's life!"

- Brian, grandson living in Maryland

ADVOCACY SERVICE PACKAGE

(Average Price Range: \$300-\$500 per month)

Our advocacy service package is crafted for seniors who have mental or physical impairments that require additional health and wellness assistance. We add these geriatric care management services to the services already mentioned, such as:

- Hire and oversee home health and other service providers
- Monitor safety and well-being
- Serve as health care surrogate.

Seniors who typically benefit from this level of service require home health or companion services to assist them with activities of daily living. As you increase the number of service providers entering the home, the exposure to financial exploitation increases. Secure Aging will handle the finances so that the health care providers can focus on their services. We coordinate the most cost-effective resources to support the least restrictive setting.

**We are here to improve
the quality of life of older adults**



Financial and Care Management for Seniors

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