

## Dawn Larimer - Owner

- Master of Business Administration
- Certified Trust & Financial Advisor – The Institute of Certified Bankers
- Over 20 years personal banking & financial services experience
- Insured



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[www.personalfinancialcaremt.com](http://www.personalfinancialcaremt.com)



Providing expertise and support with day to day personal financial matters



## SERVICES AVAILABLE:

If you or someone you know is overwhelmed managing day-to-day finances, Personal Financial Care can help. I strive to provide clients with financial support by offering great customer service and personal financial management expertise.

*Thank you for all your hard work- this is much more complicated and tedious than I ever imagined.*

*Joe, Successor Trustee*

*We are so appreciative of all your extra help and patience with us. You truly did go the extra mile for us, more than once!!*

*Kay L.*

- Pay bills & balance checkbooks
- Medical claims assistance
- Assist with Medicare/Social Security issues
- Assist in reviewing estate planning documents
- Organize mail, financial information & paperwork
- Consult with CPAs and Attorneys
- Act as Conservator, Personal Representative, Trustee or Power of Attorney
- Assist with review of investments
- Make arrangements to move client from home, assisted living facility, etc.
- Organize records for tax return preparation
- Assist with credit card companies/ debt consolidation
- Inventory assets & investments
- Assist with pre-paid funeral arrangements
- Notary Services
- And many more personal financial services



Services are charged on an hourly basis or monthly service plans are available. Initial consultations are free of charge. Call (406) 671-2073 to setup an appointment.