

## PCADV SPOTLIGHT



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A Daily Money Manager assists clients with the paperwork that comes with paying bills, preparing bank deposits, balancing the checkbook, maintaining and filing records, and organizing income tax materials. Daily Money

Managers help people with widely varying needs. They work with senior citizens, busy working people, individuals with impaired vision, people who lack the time or the patience to do paperwork, adult children taking responsibility for an aging parent's affairs, frequent travelers, and people overwhelmed by suddenly having to take care of their own finances.

I started my Daily Money Manager service three years ago, opening my own one-person business. I travel to my client's homes. The first preliminary consultation is free. While I prepare checks, my clients sign them so I never have access to their bank accounts.

I encourage my clients to do as much as they can in handling their own affairs so that they feel that they are maintaining control of their finances and retaining some independence. I do all I can to protect and conserve my clients' resources, particularly for those who seem vulnerable and have no relatives to look out for their best interests.

I prepared to be a Daily Money Manager by managing a small family business for over 30 years. I sent invoices, paid bills and taxes on time, and took care of a small payroll. I have also handled our personal daily financial affairs for an equally long period. My ability to be accurate goes back to a high school mathematics teacher who constantly stressed the need to always check your answer to be sure it is correct. I am a member of the American Association of Daily Money Managers which is a national organization.