

Financial Service Workers

DEFINITION

An individual focusing on the special needs of an elderly and / or disabled individual that deals with the management of money, banking, investments and credit.

SERVICES

- Balancing your checkbook
- Paying monthly bills
- Organizing and reconciling health insurance statements
- Generating income and expense statements
- Preserving important documents
- Shredding unnecessary documents
- Creating a personal record book

Financial Service Workers

A Little Help, Inc...... (952) 887-5043
"A Little Help" May Be All You Need
www.alittlehelpinc.com

Care Associates, Inc.
L. Carl Starich (952) 925-5853
Barbara Henke(952) 920-6777
Professional Personal Business Services

Financial Wellness For You, LLC
Maura A. Albrecht ChFC..... (651) 434-2003
Serving the Twin Cities Metro Area
www.finwell4you.com

lets get organized!
Brenda Rau (612) 385-6916
Your Life, Work, Hobby...Simplified...Organized
www.letsgetorganized.org

LifeLINE Senior Service, LLC
Jeff..... (612) 839-6838
Overcoming Challenges and Enriching Lives
www.lifelineseniorservice.com

Lutheran Social Service of Minnesota
Financial Counseling (888) 577-2227
4 Metro Locations
www.lssmn.org

Financial Service Workers

Senior Options, Inc. (763) 792-4472
P.O. Box 49097, Blaine, MN 55449
www.senioroptionsinc.com



Serving the needs of vulnerable and elderly adults.
Providing substitute decision making services.
Preserving quality of life and dignity for all individuals.

SERVICES PROVIDED:

Guardianship
Conservatorship
Trustee
Professional Power of Attorney
Healthcare Agent
Executor/Personal Representative
Daily Money Manager



For more information, please contact Kim Topphen:

763.792.4472
www.SeniorOptionsInc.com

Wells Fargo Elder Services
..... (612) 667-1413 / (612) 316-4410
P.O. Box 1146, Minneapolis, MN 55440
www.wellsfargo.com