

Do you or a loved one need help managing your bills and day to day finances?

Imagine if...

- Your loved one's day-to-day finances were overseen by a professional.
- All your bills were paid on time.
- Your important paperwork was up to date and in order.
- You had peace of mind knowing you have a trusted professional dedicated to easing the stress of managing your family's financial life with your financial well-being in mind.

Balanced Money Management (BMM) offers a variety of services to do just that and has worked with several clients of SWFG.

Their comprehensive, in-home, and remote daily money management services help clients who don't have the time, desire, or ability to manage their daily financial, administrative, legal, or health insurance matters. Our clients include high-net-worth individuals, adult children of aging parents, older adults, and those going through life transitions.

A sample of services we provide:

- Mail / File Management / Tax Organization
- Bill Pay / Banking Services
- Resolution of Billing Disputes / Fraud Review
- Quicken / QuickBooks Reporting / Account Reconciliation
- Asset Alignment for estate planning
- CPA & Estate Coordination / Estate Administration support
- Financial Concierge Services – liaison with other professionals (legal, tax, investment, etc.)
- Home Management (payroll for home staff, home modification, etc.)

Wendy Sargent is the founder of Balanced Money Management and a native of Hall County. She has worked with several of our clients. She obtained her CPA license with local CPA firm Bates, Carter & Company, and with more than 25 years of experience in the accounting industry, she has assisted families to manage their financial affairs through various stages of life from early retirement to end-of-life. A proud member of the American Association of Daily Money Managers and an active board member of North Georgia Senior Resources, a non-profit organization committed to enriching the quality of life for seniors in the North Georgia area.

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Disclosure: Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional. Raymond James is not affiliated with and does not endorse the opinions or services of Wendy Sargent or Balanced Money Management, LLC.