



STOP TAKING

CARE OF

EVERYTHING YOURSELF!

RELAX and focus on the relationship with your loved ones by hiring a Daily Money Manager (DMM)!



3 Main Learning Objectives

- ❖ Describe the risks to seniors of not closely managing bills, budgets, and personal records
- ❖ Identify the signs that might suggest a senior needs help managing their finances
- ❖ Explain how DMMs work with other professionals to support client needs

What is the American Association of Daily Money Managers (AADMM)?

- An internationally recognized professional association
- Supports the growth of the industry
- Provides educational resources for professionals and the community on daily money management services

What do AADMM members do for you?

Bring clarity and order to managing personal or business bills, budgets, and records.



AADMM members assist clients in:



What **Fraud/Scam** Do You Find Most Frustrating?



Typical clients include:

- Older Adults
 - Adults with challenges
 - Active individuals and families
 - Anyone going through a major life change
- Busy execs and professionals
 - High net worth households
 - Frequent travelers
 - Small businesses
 - Young adults

Who Do DMMs Serve?



Trouble Areas a DMM looks for with Solo Agers/Senior Clients' Finances

- Missing documents
- Lack of response
- Change in behavior



- Large, unusual withdrawals
- Repeated withdrawal requests
- Large income or windfall
- Uncashed checks

Other Signals

- Piled up mail
- Unpaid bills
- Mounting credit card debt
- Unusual, new, excessive payments



- New donations
- Multiple subscriptions
- Lottery tickets, sweepstakes
- Calls from creditors

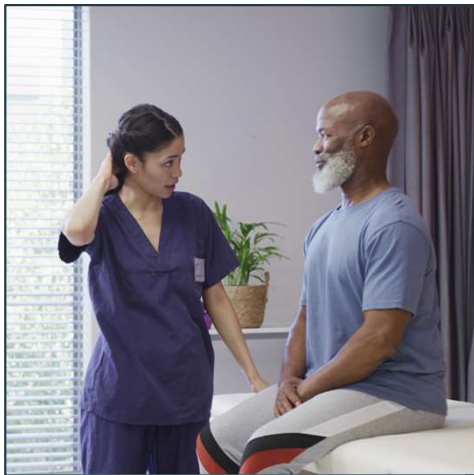
Why choose an AADMM member?

- ☐ National background checks, strict code of ethics/standards of practice
- ☐ Established credibility
- ☐ Have access to continuing educational events and resources
- ☐ Errors & Omissions/Liability insurance

AADMM members are relationship builders:

- Accountants/CPAs
- Caretaking Agencies
- Elder law/Estate Planning Attorneys
- Financial Advisors
- Geriatric Care Managers
- Mediators
- Professional Fiduciaries
- Senior Placement Realtors
- Social Workers

Four indications your clients could benefit from our services:



AADMM Members Offer Peace of Mind



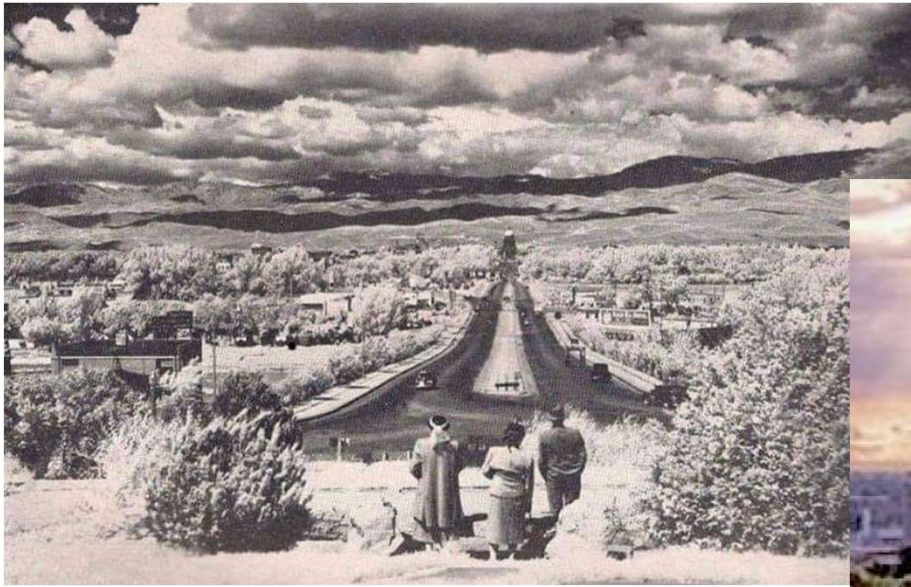
Celebrating Our 25th Anniversary!



AADMM members can be found:

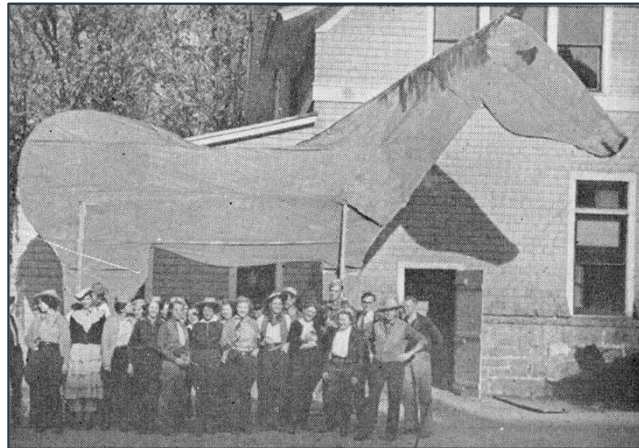
- ★ In most states in the US, the United Kingdom and Australia.
- ★ **800** members in **42** states and the District of Columbia
- ★ The State of Idaho now has **6** DMMs!
- ★ On www.aadmm.com and click on the “Find a DMM” link.

My IdaHome Story



What are my credentials?

- B.A. - Boise State University
- National Background Check
- Adhere to AADMM Standards of Practice/Code of Ethics



- Membership Dues
- Errors & Omissions,
General Liability Insurance
- Continuous Education



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