

## About Us

Over the past 14 years Expert Business Solutions has provided association management, event planning, business support and daily money management services to dozens of individuals and organizations throughout the South Florida region, including leading financial, legal, and insurance associations in Miami-Dade, Broward and Palm Beach counties.

Owner Linda Wolonick has 35 years of business experience, including 20 years as a legal assistant, with a concentration in guardianship and elder issues. She and her staff specialize in handling essential financial tasks so that your financial affairs stay on track and worry-free. To give you additional peace of mind, Expert Business Solutions has working relationships with financial experts across South Florida should you need access to specialized professional assistance.

## Daily Money Management Services

Services include:

- Reviewing and paying bills
- Balancing checkbooks, reviewing bank and credit card statements
- Mail retrieval, correspondence, and recordkeeping
- Data entry into Quicken or QuickBooks
- Budget and cash flow
- Review of medical and insurance statements and claims
- Collecting documents for tax preparation
- Coordination with tax preparer, financial advisor, attorney, or other professionals

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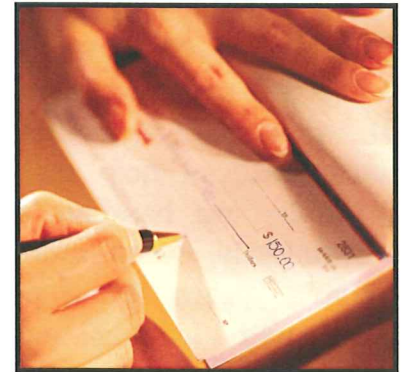
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# Expert Business Solutions



## Daily Money Management Services

954.370.0041

## Pulling the Pieces Together

Are you finding it hard to keep up with all the paperwork? Tired of being put on hold as you deal with large financial and insurance companies? Or do you spend too much time making sure your insurance, legal and financial arrangements stay up to date?

We can coordinate and keep track of all these details. At Expert Business Solutions we have experience with legal, financial and insurance matters, and can help make sure your affairs are handled expertly and seamlessly. Need more help? We have years of experience working with leading legal and financial experts in the South Florida region, and should you need additional professional assistance, will help ensure your affairs are given the attention they deserve.

**Call for a Free Consultation**  
**954.370.0041**

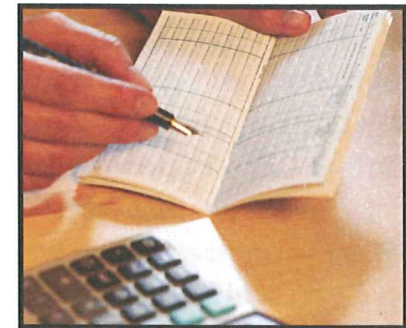
## Daily Money Management Services

Expert Business Solutions helps individuals keep their financial affairs on track and worry-free by providing essential day-to-day financial and bookkeeping support. Services include:

- Reviewing and Paying Bills
- Balancing Checkbooks and Reviewing Bank Statements
- Mail Retrieval, Sorting, and Handling Daily Correspondence
- Data Entry into Quicken or QuickBooks
- Establishing a Budget
- Review of Medical and Insurance Statements and Claims
- Collecting Documents for Tax Preparation
- Recordkeeping of Essential Documents
- Coordination with your Tax Preparer, Financial Advisor or Attorney

## What Are Daily Money Managers?

Daily money managers help clients manage their personal and financial affairs on a day-to-day basis. Services range from organizing and keeping track of important financial and medical documents, to assisting with check writing, maintaining bank accounts, handling daily correspondence, coordinating tax information, and monitoring cash flow and expenses.



**Call for a Free Consultation**  
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