



**INDEPENDENCE SERVICES, L.L.C.**  
**Eldercare & Special Needs Advocacy**

**Nancy Hawes**

You have a great financial plan for retirement years. You have planned income and insurance, proper beneficiary designations, a will, and an estate plan. But what happens when you or your loved one's competency begins to decline? Who's going to watch over the money going out? As good as your plan may be, you need to think about who will be there for you or your loved one in golden years if there is no family member available to help.

Often, there is a gap between the financial plan, accounting services, and the daily needs of the elderly and others with special needs.

Nancy's years of experience include recently Eldercare Coordinator for Warmels & Comstock CPAs for six years and nine years for Results Team CPAs when merging with W&C., and now under Independence Services L.L.C. continuing her same valuable work as the Eldercare and Special Needs Advocate and Coordinator,. During those years she has been assisting with day-to-day finances, sometimes saving her clients thousands of dollars finding tax savings for their income tax return, or from junk mail or telemarketing scams, has provided an eldercare networking system to assist in ensuring personal, financial and residential needs are met, and has assisted with daily needs in homes of the elderly or making multiple referrals to other care professionals when needed.

For instance, for one client who entered a nursing home to rehab from an accident--she arranged his surroundings so they were safe and familiar, and coordinated a birthday party for him in the nursing home. Later, when it was determined that the care facility was undesirable, Nancy arranged the client's quick release and a new assisted living home with the appropriate care workers. At another time when a client was sent to the hospital, the doctors needed to consult someone since the family was across the country, Nancy arranged for copies of the daughter's medical power of attorney to be available so doctors would talk to the daughter by phone about the client's condition while in the hospital. Since there were no other family members available, Nancy made frequent visits, kept a watchful eye, reported to the family, and served as liaison until the family returned to the area. She has assisted with bill paying, and has kept the records ready for tax preparation-- the things a family member would have done, if they could. She now refers families and clients to other agencies to assist in many of these roles.

Her work is a dedicated unique eldercare and special needs practice encompassing many facets of accounting and eldercare issues. Nancy has a great passion and dedication for working with the elderly and special needs clients.

**Various Services Available:**

- Coordinating long-term health care financial options.
- Handling business and personal correspondence
- Watching for telemarketing and junk mail scams to help to ensure protection from predators.
- Bill paying assistance and bookkeeping. Balancing checkbook.
- Serving as liaison in financial matters.
- Organizing and gathering information for tax preparation by an accountant of the client's choice
- Providing periodic reporting to client and/or family members.

Don't let your careful planning for continued income to be wasted because no one was there to care. Adding eldercare professionals to the diverse mix of people needed to fulfill the financial plan you or your loved one has developed is a smart move. Achieving the dream is in the details.

Ask about a customized plan to fit your needs. Give Nancy a call at **517-881-5643**. There is no charge for initial consultation.