Retirement Management with your Personal Executive Assistant

We provide oversight and management for time constrained executives when they are named as Successor Trustee of their parent's Living Trust. We assist in reducing the stress of the busy executive who is juggling both their own work schedule as well as the daily challenge of an ailing family member. Our customized comprehensive management advises solutions for Trustee's, Adult Children or Successor Trustees, Professional Fiduciaries, and the families closest advisor's. When there is a decline in mental ability with the onset of Dementia or Alzheimer's a tailor-made plan of action can prevent mismanagement of personal finances. We provide solutions to problems, options available for managing monthly accounting and budgeting needs, correspondence and negotiation, through to planning and assisting with downsizing a home due to declining health.

Wise Management & Financial Services offer hourly and monthly Administrative Assistant and Financial Management Services for retiree's who prefer to allocate their time to leisure and travel activities. This is an outside service available to and provided for you by One Wise Advisor.

Retirement Services available:

* Analysis and retirement facility oversight.

* Liaison with family advisors and fiduciaries to protect the Estate from Probate.

PERSONAL FINANCE: Budgeting

We all have dreams and goals, but often, we do not have someone who will make us accountable for our spending, so you.

- manage your banking transactions effectively to avoid Insufficient Funds fees

- manage your credit card purchases from a perspective of need, not 'I want'...

- manage your monthly Expenses to preserve income and build up savings

PERSONAL FINANCE: Debt Management

You know your past but you do not know your future, so we advocate your taking ownership of your decisions to try avoid financial chaos. We encourage you to "never let your mistakes, setbacks or circumstances determine your value" and that you regain your confidence so that:

a.) You can negotiate with creditors to reduce the stress in your life.

b.) You plan your budget in advance so that it is consistent with your income

SEPARATION & DIVORCE MANAGEMENT:

A marital seperation and pending Divorce creates emotional chaos in your life. Wise Management & Financial Services walks beside you to encourage you in making an informed decision, by providing a clear picture of the potential impact your pending Divorce will have on your daily life and your personal finances.

Pre DIVORCE and Separation Consulting Services:

a.) Preparation of Personal Financial Statements to establish joint and individual net worth

b.) Discussion of Business Financial Statements

Post-DIVORCE To Do List:

1. Have you updated the beneficiaries of your Will & Trust?
2. Have you updated the beneficiaries on your Life Insurance Policies and Annuities?
3. Have you updated your POD for your Bank checking and savings Accounts?

4. Have you updated your TOD for your Investment Portfolio?

We look forward to hearing from you: **(858) 350-5350**

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