

Money Management

Age Requirements

18 and over

Intake Process

Call for information or to schedule an appointment

Legacy Management

<http://legacy-mgmt.com/main.html>

Main

(703) 388-2877

22101 VA

United States

Additional Availability Comments

Monday through Friday

Fee Structure

Fee Range

Payment Method(s)

Private Pay

Languages Spoken

English

Legacy Management offers a personal business assistant to help with your money management. An assistant can

Insure bills are paid on time;

Balance and reconcile checkbooks with statements;

Collect, prepare and deliver bank deposits;

Organize personal records and de-clutter;

Reconcile insurance claims and other billing errors;

File and organize tax documents;

Collect and deliver tax information to tax preparer;

Submit claims for long term care insurance.

Also Available:

Centralized bill paying service through Client Funds;

Year end reports based on bookkeeping software;

Third party reporting as authorized by the client;

Assistance with payments to caregivers.

Service Area(s)

Alexandria City

,

Arlington County

,

Fairfax City

,

Fairfax County

,

Falls Church City

,

Fauquier County

,

Manassas City

,

Manassas Park City

,

Prince William County

Email

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