

Why you may need a Daily Money Manager (DMM)

As personal financial matters become more complicated – finding time to focus on the daily tasks of money management becomes more difficult. Gudgel Professional Services (GPS) offers services to ensure nothing falls through the cracks including necessities like monthly bill payments, tax preparation, quarterly reports, balancing checkbooks, and decoding medical bills.

DMMs work with a variety of clients such as:

- Seniors and older adults
- Adult children of older adults
- Executors and Trustees
- People in life transition
- Individuals with disabilities
- Busy professionals
- High net worth individuals and families
- Small businesses owners
- Frequent travelers
- Military personnel and veterans

Not everyone is ready or able to manage the tasks associated with daily money management. When you hire Gudgel Professional Services to assist with your needs, you have peace of mind knowing that a dedicated, trained professional will ensure your daily financial matters are handled in a timely and professional manner so you can focus on the things you enjoy.

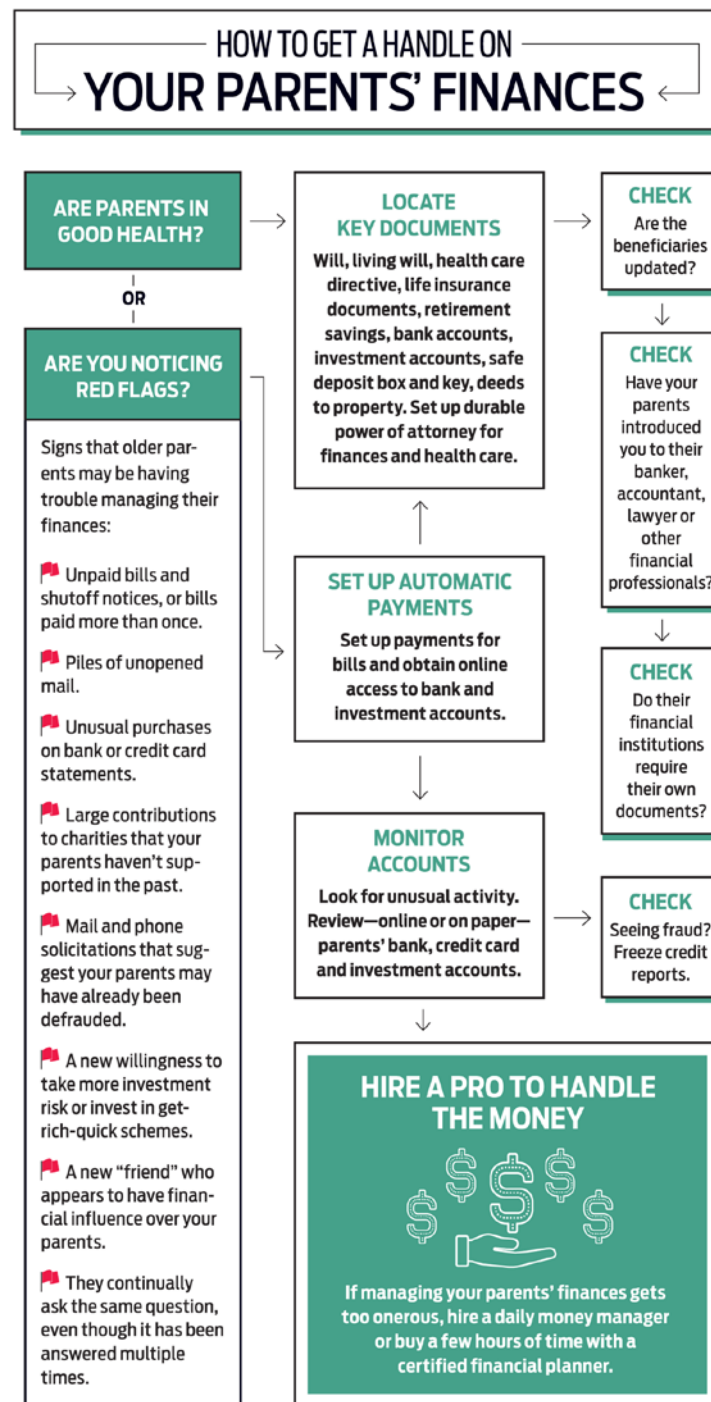
What types of tasks will a DMM handle?

The expertise of DMMs covers a broad range of tasks, and the actual work we do depends on client need. However, the scope of our work as DMMs generally includes the following:

- Bill-paying, including calls to payees regarding incorrect bills
- Balancing checkbooks and maintaining organization of bank records
- Reviewing medical bills and insurance documents
- Preparing and delivering bank deposits
- Organizing tax documents and other paperwork
- Providing referrals to and working with legal, tax, and investment professionals.

It's like having a personal Chief Financial Officer (CFO) on staff. Leave the finance-related tasks and associated processes to the professionals.

If you choose to hire Gudgel Professional Services for DMM, you are not required to use our tax preparation services. We are willing to work with the tax professional of your choice.



Why you may need a Tax Professional outside of "Tax Season"

Many people only contact their CPA, EA, or tax professional once each year. However, family circumstances may justify contacting Gudgel Professional Services (GPS) outside of Tax Season.

Household Employees

Did you know that the caregiver or companion that you hired is likely a household *employee*? As a household employer you have to provide tax documents to your employee and may have to file estimated payments. GPS can help you through this process.

Trust Accounting and Taxes

Did you know that if you have a trust or are trustee that there are special accounting and tax filings? If you have a trust, do you understand how the beneficiaries will be taxed? GPS can provide guidance on trust accounting and taxes.

Tax Preparation

GPS prepares income tax returns for individuals, small businesses, estates, and trusts. We can also assist with prior years, estimated payments, payroll filings, and information reporting requirements.

Why Consult with an Enrolled Agent?

Some call EAs the Providers of Tax CPR (Consultation, Preparation, and Representation). When you're in medical distress, you seek CPR. When you're in tax distress, you can call on Enrolled Agents who are experts in Tax CPR.

Katherine (Katie) Gudgel

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Katie grew up in Tempe, AZ and went to the University of Arizona where she received a B.S. in Physics and M.S. and Ph.D. in Materials Science and Engineering.

When she moved to Germany in 2001, Katie worked as a scientist, but soon became interested in the business side of product development and how to help businesses become more profitable. In Chicagoland, she earned a degree in accounting and qualified to take the CPA exam.

While in school, Katie gained practical experience preparing taxes by volunteering with Ladder Up's VITA program (Volunteer Income Tax Assistance). With this program, she progressed from volunteer preparer, to quality reviewer, to site leader, to lead trainer.

As an Enrolled Agent (EA), Katie specializes in helping seniors and trusts. Early on, Katie found that many taxpayers have difficulties collecting all of the documents needed in order to prepare their tax returns, and in 2015, after a colleague introduced her to AADMM, she expanded her services to include Daily Money Management.

GUDGEL PROFESSIONAL SERVICES



Trustee Services
Tax Consulting and Preparation
Daily Money Management

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Helping People Navigate Their Financial Journeys

