

Please Note: It is important that your loved one receive quality care. The information is based on the provider's description of their own services. We cannot guarantee, endorse, or recommend any provider listed and the information may change without notice. This is an informational list only and we update it regularly. Through our 24-hour Helpline and Care Consultation program, we have the skills to coach you on how to use these resources and how to make them successful for your situation. We can help you know when it's relevant and how to be a good consumer of the resource. Call one of our experts today. Furthermore, if you notice any resource listed with inaccurate information, please let us know.

Money Management Resources

Agency Name / Address / Phone	Services	Who Can Use?	Cost
Continuum 12882 Manchester Road, Suite 201 Saint Louis, MO 63131- (314) 863-9912 or (636) 861-3336	A thorough financial assessment is completed. Provides: Oversight of monthly and recurring expenses; Bill paying, analysis and reconcile checkbook on a monthly basis; Creation of monthly financial records; Organization of year end tax information; and Tax preparation services (if needed).	Anyone needing assistance	\$70-\$85/hour
County Older Residents Program (CORP) 121 South Meramec Avenue Clayton, MO 63105 (314) 615-4516 or (314) 614-4425	Tax preparation: federal and state returns and schedules are prepared for income eligible seniors; appointments are required during tax season; Missouri property tax rebate (also known as Circuit Breaker) forms are prepared year round; forms assistance; assistance with insurance claims forms and information regarding federal, state and local benefits programs is provided free of charge; call Monday-Friday between 8:00AM and 5:00PM for more information.	St Louis County Residents 60 and older	Free (donations are encouraged)
DH Services, LLC 1033 Huthmaker Saint Louis, MO 63122- (314) 966-3032	Bill paying; reconcile financial statements; organize mail and other important documents; maintain medical and tax records; assistance with Medicare Part D; referrals for other services	Anyone	Hourly rate based on service provided

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Financial Ledger, Inc. 141 North Meramec Avenue, Suite 107 Saint Louis, MO 63105- (314) 725-5119	Bookkeeping: bill paying, bank deposits; income record keeping; checkbook balance; Income Tax Services: professional tax return preparations; year-round advice.	Anyone	\$80/hr.
Fixed Assets, LLC 19 Berry Wood Drive Saint Louis, MO 63122- (314) 604-0434	Check writing and bill payment; bank statement management and reconciliation; vital records organization and storage; paper filing systems; liaison with other financial advisors.	Anyone. Free initial consultation by phone.	\$45-\$75 per hour (based on the client's particular circumstances and scope of work performed).
Middendorf Financial Group 2 City Place Drive, Suite 200 Saint Louis, MO 63141- (636) 391-4030 or (800) 449-8106	Estate planning; long term care planning; Medicaid; life insurance; assistance in creating income for retirement	Anyone	No cost
Midwest Pension Rights Project 2165 Hampton Avenue Saint Louis, MO 63139- (314) 725-1516 or (877) 725-1516	Pension benefit recovery; pension plan interpretation; eligibility determination; locating lost pensions; referrals to attorneys, actuaries and other organizations.	Anyone	Services provided free of charge.
Next Step/Elder Assist, The 2190 South Mason Road, Suite 205 Saint Louis, MO 63131- (314) 821-9111	Bill paying assistance; medical insurance filing assistance; general bookkeeping services; medicaid and financial planning for seniors. Also offers geriatric care management services.	Anyone	Care management \$85/hour, Financial Management \$60/hour, Medicaid Consult \$125/hour
Senior Relocation Services 11912 Manchester Road Des Peres, MO 63131- (314) 909-9400	Consultation during the entire moving process; worry- free home purchase program; flexible closing; interim financing; moving; disposition of personal property	Seniors who are in need of relocation assistance	Call office for cost

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Summit Advisory Services, LLC. 1034 South Brentwood Boulevard, Suite 1910 Saint Louis, MO 63117- (314) 480-1393	Family wealth creation; coordinate investment programs; retirement plans and employer benefits; family wealth preservation; risk management; income tax planning strategies; family wealth transfer; estate tax reduction; effective gifting; business succession planning	Anyone	Based on service provided
Tutschulte Financial Planning 111 West Port Plaza Drive, Suite 300 Saint Louis, MO 63146- (314) 682-2331 or (866) 463-0752	Comprehensive financial planning.	Anyone	Free initial appointment. Fees varied based on services.
Volunteer Money Management Program 1150 Hanley Industrial Court Saint Louis, MO 63144- (314) 446-2474 or (314) 446-2523	Lutheran Senior Services, and Jewish Children & Family Services: volunteers help with sorting; organizing; recording monthly bills and statements 1-2 hours a month; volunteers can help write checks for monthly bills; clients sign their own checks; volunteers can review and reconcile monthly bank statements; staff member meets with every client to determine needs.	50+ (with disability and social security); 60+ with a checking account;	Modest fees are charged on a sliding scale. Very flexible with service.
Wealth Protection Advisors, LLC 2046 Queensbrook Saint Peters, MO 63376- (636) 441-3700 or (866) 279-7453	Financial planning; help qualifying for Medicaid; planning for retirement; planning for long term care needs; have staff of financial advisors as well as geriatric care managers	Anyone	Free one hour consultation. Hourly fees for additional services are determined during consultation.