

**Debbie Verity, C.P.G.**  
**Daily Money Manager**

As a daily money manager I function as a personal financial assistant, specializing in assisting seniors and people with disabilities. My goal is to help you retain your independence by helping you manage your finances.

Qualifications:

- Credentialed Professional Gerontologist (C.P.G.) after completion of a 2-year gerontology program at Foothill College
- 10 years banking and corporate credit management experience
- 8 years direct experience helping seniors with personal finances
- Errors and Omissions Insurance
- General Liability Insurance



**Contact Information**

**Verity Money  
Management**

**Debbie Verity, C.P.G.**  
**Daily Money Manager**

**(650) 464-4330**  
**Debbie@VerityMM.com**  
**www.VerityMM.com**

Please contact me today to discuss your needs. I offer a free, one-hour consultation in your home.

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Office Hours:  
Monday to Friday  
9:30 AM to 5:30 PM

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*Working with Clients on the  
San Francisco Peninsula*

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**Verity Money  
Management**



**Debbie Verity**  
**Daily Money Manager**

*Promoting the independence  
of seniors and people with disabilities  
by assisting with personal  
finances.*

Let me be that trusted person in your life who helps you pay your bills on time, helps you handle your personal business mail in a timely manner, and safeguards you against elder financial abuse.

## ***Who Should Hire a Daily Money Manager?***

***A senior or adult with a disability*** who wants help or understands that they need help managing their money.

***Their adult child, family member or guardian*** who may live out of state or has a busy professional or family life. As much as they'd like to help, it's difficult for them to handle their loved one's finances themselves.

***A relative or friend named as their durable power of attorney*** who finds they need help to best meet their responsibilities.

"Debbie has been a tremendous asset to my step-father as his dementia has progressed. Debbie shows excellent attention to detail, anticipates future needs, and has established excellent rapport with him. We have found Debbie to be trustworthy, caring, and professional at all times. This journey would be much more difficult without her help and expertise."

Beth C.

- ## ***Services Offered***
- Select those services that meet your individual needs:***
1. Tracking and resolving issues with your medical bills and insurance claims
  2. Reviewing and paying your bills
  3. Contacting creditors and financial companies as needed
  4. Making bank deposits
  5. Balancing and monitoring your bank statements and investment accounts
  6. Tracking income and expenses using Quicken
  7. Budgeting and spending plans
  8. Reviewing and replying to business mail under your direction
  9. Organizing your business files
  10. Organizing documents for income tax purposes
  11. Working with your attorney, financial planner and tax accountant as needed
  12. Providing referrals to legal, investment and tax professionals

***You retain control of your finances, including check signing.***

"Debbie is a warm and caring person who can also handle money and has been able to offer financial suggestions we wouldn't have thought of - what a blessing she has been to our mother and family!"

Nancy L.

"Debbie understands the complexities of aging, continually updating her knowledge of financial, legal and health issues that affect the lives of older adults and their families. Debbie has the skills to manage a wide variety of financial situations. Discrete and professional, she is sensitive to the very personal role she plays in the lives of her clients."

Pam H.