

ADVICE

BEA VICTOR / AS WE ARE

You can get assistance organizing life's details

Long-time Island resident and businessman now a Daily Money Manager, will help you pay bills, etc.



BEA VICTOR

I guess it is safe to say that most of us, in-one-way-or-another, spend some time thinking about what our future will be like. Poets call it dreaming. Others define it as wishing. Organizers call it planning. Some folks call it worrying/confusion/fear.

Who, you might ask, would be the worriers? An answer was given to me by George Fehling, CEO of Ramps/Lifts for Better Living as we sat around my table drinking tea. You know George, don't you? He has been around Staten Is-

others, so I share the above because what he is now set up to do as he plans his eventual retirement from his CEO position (he is a young 76) could require some trust.

land for quite a while, living for 47 years in the same house in Great Kills; he's the recipient of so many awards — New Yorker of the Week in 2003, Alzheimer's of S.I., Richmond Senior Services, Louis R. Miller, S.I. Chamber of Commerce and so many more.

While installing ramps in Staten Island and Brooklyn, he has been made acutely aware of a need sorely experienced by widows and

would come to the home for about two hours to organize whatever the need or needs and return only as necessary.

FREE CONSULTATION

He has become a member of the American Association of Daily Money Managers and now, after a lot of study, has the title of Daily Money Manager. Their purpose is to supervise a means of organizing life's little details for people who have either lost the person who handled them before and do not know how or where to start, or others too busy to handle the many details themselves, as well as anyone who does not want to be bothered with timely payment of bills, etc.

As I understand it, he

vestments clearly; organize papers for your CPA and see to it that any final plans are clearly defined in writing. He will help you to set up a budget and organize your appointments.

His card offers a free consultation, but his services are not free, although he says they are moderate. He is not an attorney. He is not a Certified Public Accountant (CPA). He does not do taxes. He does not require Power of Attorney.

What he will do is organize and set up your accounts in a filing system with dates listed for payment. He will return as needed to make certain bills are paid in a timely fashion. He will help you to organize your plans for the future; make certain your policies are paid; list in-

were questions that required answers in that booklet that my children should have easy access to I had never even considered before.

I have sent some feelers out to see if there are any free services for those who may need similar help, but at this writing I have not heard of any. So, if they are there, please send me contact names at mombea@gmail.com and I will happily share them.

He shared a most efficient and helpful guide for recording keeping with me that clients receive. It was authored by Trudy Couch, Ph.D. In answer to my thought — "That is fine now, but what happens as the years go by and things change" — I noted the following in a note from the author: "A packet of loose-leaf pages may be included with this guide so that you can easily replace, insert or delete pages as circumstances require." All bases seem to be covered.

I thought I had pretty complete records, but there

In the meantime, I suspect you have more questions for details or about needs I have not addressed, so should you wish to contact George by phone, call 718-605-2626. You can also email info@VitalOrganizationalSystems.com.

Bea Victor's As we are column appears on the news pages of the Sunday Advance.