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I help busy professionals, entrepreneurs, and families organize their time-consuming paperwork. Together we establish a system to track what is needed for your CPA, attorney, tax preparer, or medical insurance companies. My aim is to take away the burden of maintaining your bookkeeping system and to provide accurate, detail-oriented reporting that brings financial clarity and peace of mind.

Here's How I Can Help

Organize Your Personal Finances

- Get your household finances organized and set up on Quicken
- Teach you how to use Quicken or maintain it for you
- Ensure correct posting for every transaction, resolving discrepancies
- Pay bills, organize expense categories, reporting
- Reconcile bank and credit card accounts
- Track and maintain paperwork for CPA, attorney, tax preparer

Organize Your Business Finances

- Get your company set up on Quickbooks Online (QBO)
- Teach you how to use QBO or maintain it for you
- Ensure correct posting for every transaction, resolving discrepancies
- Pay bills, receive client payments, daily money management, etc.
- Track client hours and invoices
- Reconcile bank and credit card accounts
- Clarify financials through regular reporting
- Track and maintain paperwork for CPA, attorney, tax preparer

Tracking Medical Claims

- Submit and track health insurance claims
- Keep chart on health insurance claims to record costs and track reimbursements
- Call doctors and health insurance companies on behalf of client