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An Introduction

Hello, my name is Todd Meyer. I'm one of the principals of MMI Financial Group, Inc. Our offices are located in historic downtown Owosso, MI.

MMI is a boutique style independent Insurance & Financial services firm. We are locally owned and we have no primary insurance or investment company affiliation. Many of the products and services that we provide to our clients are unique within our business space.

I personally head the Daily Money Management & Financial Concierge Services Department. Daily Money Management -- often referred to as DMM services, is a rapidly expanding profession within the financial services industry. Daily Money Managers (DMMs) deliver important financial services to a wide variety of clients including aging seniors, people providing assistance for family members, people coping with serious medical conditions or a disability, busy professionals, high net worth individuals, frequent travelers, individuals going through life transitions and others.

DMMs bring clarity and order to the management and record keeping of an individual's ongoing income, personal bills, budgets, assets and estate plans. DMMs often act as the financial coordinator for a client's team of advisors, caregivers and family members.

Although we are a full service DMM practice, our concentration is on senior financial & estate management and aging-in-place.

Very few people plan for the eldercare part of their lives. Statistics show that an estimated 6 out of 10 people will need eldercare at some point in their lifetime. Many families will be forced to deal with the challenges that come from aging and long distance care giving. We can help.

Planning for aging and elder care is clearly an important element that should be included in everyone's financial plan and retirement plan today. An aging-in-place/family care plan is not a product that one purchases, but rather a well-organized game plan which identifies personal and family resources, and addresses life-care management choices and preferences for the remainder of one's life time.

Our DMM team has more than 30 years of hands-on experience working with clients and their families. We are active members of the American Association of Daily Money Managers.

We offer prospective clients a free face-to-face or teleconference consultation.

Call today to schedule your free consultation