

OUR VALUES

TRUST

INTEGRITY

DISCRETION

Fiduciaries are trusted people engaged to manage property and assets for someone else.

HOW WE TAKE CARE OF YOU



PROFIDUCIA IS YOUR FAMILY CFO

Delivering peace of mind through a universal approach to the organization and synchronization of your personal financial affairs. We coordinate with your attorney, CPA, wealth manager, and the rest of your professional advisor team to accomplish the plans you make with their counsel.

- Daily Money Management, including monitoring and reporting
- Recordkeeping and year-end coordination
- Strategic planning
- Family member financial coaching



PROFIDUCIA IS YOUR PERSONAL BOOKKEEPER

As a professional fiduciary service provider, Profiducia does administrative tasks for individuals of a personal financial nature. We pay bills, we track spending, and we assist as needed in getting your year-end numbers to whomever prepares your tax returns.

Perhaps you are part of the “sandwich generation”, with kids in school as well as aging parents, both who need your time and attention? Profiducia can provide relief for at least one part of that scenario – let us do the personal bookkeeping for the elders in your life, so that you can focus on their personal needs.

You work hard, plan ahead, and do all that you can to provide for the ones you love. What is your backup plan for you? Having Profiducia as your personal bookkeeper is an assurance that lets you sleep better at night, knowing that there is a backup plan for the details you’re taking care of for your family.



PROFIDUCIA SOLVES YOUR NEED FOR ESTATE MANAGEMENT AND CLOSURE

Not sure whom to name as your executor? Or, are you an executor in search of some relief? Profiducia delivers peace of mind by taking on, or helping you with, these very important responsibilities, which include:

- Identifying and obtaining Date of Death values on all items
- Marketing and selling items as required, such as vehicles, homes, art, and businesses
- Liaising between the estate and its various heirs and beneficiaries
- Marshalling assets, making distributions, filing the final tax return, and closing the estate



PROFIDUCIA IS YOUR FINANCIAL ADVOCATE

Is there a vulnerable someone in your life in need of a person they can trust to pay their bills, protect them from fraud, and argue with the utility company? As a financial advocate for our clients, Profiducia delivers peace of mind to you and your loved ones with strength and resolve. This includes:

- Personal bookkeeping and record keeping
- Continuous money monitoring and alerting
- Actual versus budget reporting on a frequency of your choosing



PROFIDUCIA IS YOUR AGENT FOR PERSONAL BUSINESS MATTERS

If your schedule was overly full because of the huge garden in your back yard, you'd hire a gardener to give you some relief. The gardener would have one focus – the garden. Same thing when it comes to domestic administration – you have all of those little details that make the difference between feeling caught up and paying another late fee. And – despite your best intentions - you started to pay bills, but got distracted by the pile of laundry! (The bills can wait, but your softball player needs her uniform NOW).

Hiring Profiducia as your agent for your personal business matters - someone specifically engaged to get things done for you - means your personal business is their only focus. They're not going to be distracted by your laundry.



Profiducia bridges the relationship between you and the important people in your life to implement the plans that you have created with them.

CERTIFICATIONS & MEMBERSHIPS

