



Dawn Larimer -
Owner

- Master of Business Administration
- Certified Trust & Financial Advisor – The Institute of Certified Bankers
- Over 20 years personal banking & financial services experience
- Member of American Association of Daily Money Managers
- Insured

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Providing expertise and support with day to day personal financial matters



SERVICES AVAILABLE:

If you or someone you know is overwhelmed managing day-to-day finances, Personal Financial Care can help. I strive to provide clients with financial support by offering great customer service and personal financial management expertise.

Thank you for all your hard work- this is much more complicated and tedious than I ever imagined.

Joe, Successor Trustee

We are so appreciative of all your extra help and patience with us. You truly did go the extra mile for us, more than once!!

Kay L.

- Pay bills & balance checkbooks
- Medical claims assistance
- Assist with Medicare/Social Security issues
- Assist in reviewing estate planning documents
- Organize mail, financial information & paperwork
- Consult with CPAs and Attorneys
- Act as Conservator, Personal Representative, Trustee or Power of Attorney
- Assist with review of investments
- Make arrangements to move client from home, assisted living facility, etc.
- Organize records for tax return preparation
- Assist with credit card companies/ debt consolidation
- Inventory assets & investments
- Assist with pre-paid funeral arrangements
- Notary Services
- And many more personal financial services



Services are charged on an hourly basis or monthly service plans are available. Initial consultations are free of charge. Call (406) 671-2073 to setup an appointment.