

CGColeman Services

Charlyne G. Coleman

SERVICES:

INDIVIDUAL SERVICES PROVIDED

Serve as a line of communication between clients, family, caregivers and other service providers as requested

Confer with individuals who hold a Power of Attorney to identify and address needs

Operate as a financial liaison between clients, family, and outside services.

Organize and integrate financial statements to clearly communicate financial activities creating desired monthly, quarterly and annual accountings

Prepare and file reports addressing various needs including but not limited to long term care insurance, health and/or supplemental insurance, and taxes related to caregivers and household employees.

Receive, record and pay bills as directed

Write business and/or personal letters as needed

Work with clients to organize, manage and prioritize unique individual and group projects as requested

TAX SERVICES

Prepare federal and state(s) personal and fiduciary (estate or trust) tax returns.

Prepare and file quarterly estimated tax vouchers, NC unemployment insurance taxes, and year end W-2 statements for caregivers and household employees

Identify available tax deduction opportunities through the review and/or oversight of financial activities.

Prepare or amend prior year tax returns as needed

Prepare client records for external tax preparers if needed

TRUST ACCOUNT SERVICES

Prepare monthly, quarterly or annual accountings and associated records from Trust Under the Will or Trust Under Agreement statements for the trust and/or personal income tax returns.

Distinguish income and principal distributions from the trusts

FEES

To be determined based on scope of service performed • Contract to indicate service parameters

I can meet with you in your home, my residence or via telephone by appointment

No Charge for Initial Consultation

Charlyne G. Coleman

References Available Upon Request

(828) 697-7046

Fax: (828) 693-0544

Charlyne@CGColemanServices.com

P.O. Box 2757

Hendersonville, North Carolina 28793