


Service Profile

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| | <i>Active Personal Business Management, Inc.</i> |
| Type of Service: | <i>Personal Business Manager</i> |
| Senior Services Director: | Cheryl and Jack Bartz |
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| Address: | 237 Middaugh |
| City, State, Zip: | Clarendon Hills, IL 60514 |
| Telephone/Fax: | 630 655 9888 |
| Website: | www.activepbm.com |

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| Services Include: | <ul style="list-style-type: none"> • <i>Pay bills and balance account statements.</i> We help determine which bills should be paid and when, balance your checkbook, reconcile monthly statements, and organize and file paperwork. • <i>Check medical and dental insurance claim forms.</i> Medical and dental insurance claim forms are documented on a spreadsheet to determine who has and has not been paid first before any payment needs to be made. • <i>Make phone calls, write personal and business letters.</i> Communication is made with companies to purchase items, return items, and resolve billing problems. • <i>Schedule appointments, run errands.</i> Arrange time and transportation to take people of the doctor, to the store or order goods or services. • <i>Assemble income and deductible expenses for tax preparation.</i> Organize statements, invoices, receipts, etc., that pertain to tax return preparation. • <i>Advocate at nursing home or hospital.</i> Oversee what is being done by a caregiver to speak up for the best interests of the person being cared for when one is not able to speak for oneself. • <i>Prepare asset inventory for an income-expense statement, budget, financial plan, will, trust, net worth, etc.</i> Listing one's financial matters in one place can help you have peace of mind knowing what your financial situation is and where your money is being used. • <i>Coordinate the planning of a funeral.</i> We can help document and communicate with funeral directors regarding the wishes of individuals and families for planning the various parts of an appropriate funeral. |
| Company Profile: | <i>ACTIVE</i> is an in-home, tax deductible service keeping people independent by helping them with their personal business, such as paying bills, medical insurance claims, etc. <i>ACTIVE</i> is bonded, registered and insured. The affordable alternative to personal business services. |
| Service Profile: | To enable the client to be self-sufficient and maintain personal independence in their own home. This is an in-home, tax deductible service to process personal business matters by appointment at a time convenient to the client. The client determines what needs to be done and when it needs to be done! |
| Additional Information: | A no obligation needs assessment consultation is offered for free. |
| Additional Contact: | <p>For contact: FBartz@aol.com</p> <p style="text-align: center;">Peace of Mind</p> <div style="text-align: center;">  </div> |