MARCHI & SMITH

PROFESSIONAL FIDUCIARY SERVICES

Marchi & Smith provides highly experienced, competent, compassionate, and ethical fiduciary services to our clients. We have proven expertise in assessing the financial situation and needs of our clients while demonstrating scrupulous attention to the highest ethical standards. Our first consideration in fiduciary services is to ensure that the overall needs of each client are identified and met to the fullest extent possible, as defined by their financial resources. We make confidential arrangements with our clients and/or their responsible parties to oversee the financial management of their daily needs. We are highly proficient in meeting the rigorous demands of trust accounting and utilize the standards established by the probate court for fiduciary accountings.

Marchi & Smith offers a wide variety of financial services, including:

- A thorough inventory of clients' assets and assessment of their current financial needs
- Collaboration with clients and clients' designated decision-makers to establish a Financial Management Plan
- When appropriate, consultation with a Certified Financial Planner in order to assess a financial plan and develop a long term financial management and investment strategy
- Conservation of clients' assets wherever possible while preserving their quality of life
- Budget organization, establishment and maintenance
- Bill paying and bookkeeping
- Medical insurance claims
- Organization of tax records
- Cash flow analysis and financial statements
- Annual accounting to clients, clients' designated representatives, or court as required
- Collaboration and advocacy with financial institutions, pension plans, insurance companies, government agencies
- Powers of Attorney
- Conservatorships of Estate and/or Person
- Trust Administration
- Special Needs Trust Administration
- Representative Payee for Social Security
- Probate Estate Administration