

American Association of Daily Money Managers

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AMERICAN ASSOCIATION OF DAILY MONEY MANAGERS (AADMM) **VOTES OFFICERS AND BOARD FOR 2009**

The Board of Directors of the American Association of Daily Money Managers (AADMM) has elected *Roberta Gosier*, Help Unlimited, Inc., Silver Spring, MD as its 2009 president. Other officers serving in 2009 include: new Vice President – *Marcia Turner*, Y.E.A., LLC, North Branford, CT; returning Secretary – *Barbara Hance*, Barbara H. Hance Associates, Farmington, CT; and new Treasurer - *Gloria Froman*, Let Me Get the Bill, Inc., Skokie, IL

The AADMM is a national membership organization representing individuals and businesses in the growing profession of daily money management—a profession that provides personal services to seniors, the disabled, busy professionals and others. AADMM is committed to promoting high standards of client services provided by members, and to supporting the growth of the daily money management profession--in numbers of providers, in recognition of the field and in the quality of services provided. AADMM promotes excellence in services through a voluntary certification program that emphasizes both experience in the field and education. Members adhere to a strict code of ethics and standards of practice.

President *Roberta Gosier* was one of the founding members of AADMM and has remained active while growing her business from one person in 1991 to a staff of 12 full and part-time daily money managers today. She serves a client base of older citizens in the Washington DC and Maryland suburbs. Vice President *Marcia Turner* joined the organization in 1997 and completed two terms as president in 2006. She established her daily money management business in 1996 after a 22-year career in retail bank management with Fleet

Bank and its predecessors. An AADMM Board member since 2004, Secretary *Barbara Hance* established her company to provide personal and financial management services to the elderly, the infirm, and people with special needs. The company now has offices in Farmington and Avon, CT. Treasurer *Gloria Froman* has more than 20 years experience in financial accounts management. She holds a Bachelor's degree from the University of Illinois and attended a graduate fellowship program at Roosevelt University.

At its January meeting, the Board will welcome new members *Lalita Brockington*, Brockwill LLC, Brooklyn, NY; *Kathryn Maxell*, Maxwell Money Management, Novato, CA; *Courtney Smith*, Benefit Payee Service, Inc., Denver, CO and *Vivian Wright*, Common Sense Solutions, Inc., Atlanta, GA.

In addition to the officers and new members, continuing on the board will be *John Bowen*, Bookkeeping and Daily Money Management, Falls Church, VA; *Carla Morelli*, FreyerMartin, Gaithersburg, MD; *Gina Pirrone*, GCP Financial, LLC, Ho HoKus, NJ; *Pete Conklin*, Personal Affairs Management LLC, Springfield, Virginia; and *Karl J. Nielsen*, Nielsen Associates, Milford, NJ.

For more information on AADMM, please visit the website at www.aadmm.com.

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NOTE TO THE EDITOR: Brief bios of Officers & Board are included below.

Brief Biographies

AADMM Officers and Board, 2009

(Arranged in alphabetic order)

John Bowen, PDMM (*Past Board President*) Bookkeeping and Daily Money Management, Falls Church, Virginia

John Bowen began his bookkeeping and DMM business in early 2003, after a career as an economic/commercial officer in the U.S. Foreign Service. He does bookkeeping for small businesses and non-profits and provides DMM services for busy professionals (including owners of small businesses). His business includes helping businesses and individuals set up and customize Quicken or QuickBooks, and he teaches both programs in the local adult education program.

Lalita Brockington, (Board Member) Brockwill LLC, Brooklyn, New York

Lalita established her Daily Money Management business in 2005 after joining AADMM in 2003. She now offers DMM services to busy professionals while drawing on her twenty plus years of experience in the fields of education, business and law. She has a undergraduate degree in sociology, a master's degree in business and a law degree. Currently she is a Volunteer Bill Payer Monitor for the AARP Foundation Money Management Program.

Pete Conklin, PDMM, CSA (Board Member) Personal Affairs Management LLC, Springfield, Virginia

Pete Conklin has been providing daily money management and organizational services for clients since 1983. Pete is president of Personal Affairs Management LLC based in Springfield, VA. He is a Certified Senior Advisor and is a member of the American Society on Aging, the National Council on Aging, and Business Networking International. Pete is a graduate of the National Endowment for Financial Education and numerous continuing education courses. Pete brings extensive experience in working with seniors.

Gloria S. Froman, PDMM (Board Treasurer) Let Me Get The Bill, Inc., Skokie, IL

Owner and President of Let Me Get The Bill Inc., Gloria S. Froman established this personal, professional and confidential practice to provide solutions and the healthy maintenance of financial and paperwork activities. Gloria holds a Bachelor's degree from the University of Illinois and attended a graduate fellowship program at Roosevelt University. Supplemental and additional coursework include Accounting, Insurance, Human Services, Health Information Management and Medical Billing and Coding. With more than twenty years experience in financial accounts management, she is also licensed, insured and bonded as an Illinois Insurance Producer and Notary.

Roberta Gosier, PDMM (Board President) Help Unlimited, Inc., Silver Spring, Maryland

Roberta has been the owner and Director of Help Unlimited, Inc. since 1991 and has expanded the business from one person to 12 full and part-time Daily Money Managers serving elderly clients in Washington, DC and the Maryland suburbs. Services include bill paying, checkbook reconciliation, medical bill and medical insurance issues, and as needed, working with attorneys, care managers, accountants, and other professionals. Previously, she was employed as an Assisted Living Coordinator in a retirement community, as a social worker with the DC Welfare Department, and as a hospital social worker with the American Red Cross.

Barbara Hance, PDMM (Board Secretary) Barbara H. Hance Associates, Farmington, Connecticut

Barbara has served on the AADMM Board since 2004. She established her company, Barbara H. Hance Associates, Inc. to provide personal and financial management services to the elderly, the infirm, and people with special needs. The company now has offices in Farmington and Avon, Connecticut. Barbara has professional experience as a Probate and Estate Paralegal. Barbara also appeared on the *Today Show*.

Kathryn Maxwell, (Board Member) Maxwell Money Management, Novato, California

Kathryn Maxwell, President of Maxwell Money Management, entered the field of daily money management in 1982. Her firm offers bill-paying and bookkeeping services to busy professionals and small businesses. Maxwell Money Management employees 9

bookkeepers and has 2 offices in the San Francisco Bay Area. Kathryn is co-author of "Richer Than You Dreamed" (Clarkson Potter, 1991), an empowering book for helping couples develop good communication and effective systems for managing joint finances.

Carla M. Morelli, (Board Member) FreyerMartin, Gaithersburg, Maryland

Carla Morelli, President of FreyerMartin, brings over 15 years of experience in the personal and business finance arenas. For the eight years prior to forming FreyerMartin, she provided management and technical consulting to businesses implementing or upgrading Oracle Financials systems. Her career success came with one downside - no time to manage daily financial details at home. The need for a personal assistant who would handle her finances was so strong that Carla retired from consulting in 2003 to form FreyerMartin.

Karl J. Nielsen, CSA (Board Member) Nielsen Associates, Milford, New Jersey

Karl is a Certified Senior Advisor and joined the AADMM Board in 2005. He enjoys helping people and volunteers at this church, where he has been the treasurer in addition to other duties for many years.

Gina Pirrone, PDMM, CSA, (Board Member) GCP Financial LLC, Ho Ho Kus, New Jersey

Gina is the founder of GCP Financial, LLC, and joined AADMM in 2003. She attained the certificate of Professional Daily Money Manager (PDMM) from AADMM in 2007 and acquired the designation of Certified Senior Advisor (CSA) from the Society of Certified Senior Advisors in 2004. As a specialist in Personal Financial Organization and Records Management, Gina's business serves seniors who require assistance in managing their various financial & insurance needs, executives, and individuals whose assets require detail recordkeeping, and legal guardians who require organized reports for court review. She brings to AADMM over 20 years experience in Accounting, Operations, and Benefits Management from a career with M.J. Meehan & Company (former NYSE Member Firm) of New York City.

Courtney Smith, PDMM, RG, (Board Member) Benefit Payee Service, Inc., Denver, Colorado

Courtney is a certified Registered Guardian and Professional Daily Money Manager. She founded her company in 2002 and now has two locations in Colorado and Indiana. Courtney specializes in working with seniors and persons with mental and physical disabilities. She acts as a fiduciary in a variety of areas including Daily Money Manager, Conservator, Power of Attorney, Trustee, Rep Payee, and Personal Representative. She is very active and involved in Colorado, Kentucky, and Indiana, serving on a number of committees and associations that involve protecting at-risk adults and minors. Courtney served as the Treasurer from 2004-2005 for the National Association for Women Business Owners in Denver, Colorado. Her company was also a finalist for the Colorado Business Ethics Award in 2008.

Marcia L. Turner, PDMM, CSA (Board Vice President) Y.E.A., LLC, North Branford, Connecticut

Marcia is a long-time member of AADMM, having joined the organization in 1997. She established her daily money management business in 1996 after a 22-year career in retail

bank management with Fleet Bank and its predecessors. Marcia's business serves individuals, small businesses, and nonprofit organizations. She brings to AADMM her expertise in the management of nonprofit organizations, which she developed during 16 years of experience in leadership and financial positions. Marcia has held various local positions with Financial Women International and also served as New England District president for that group.

Vivian Wright, (*Board Member*) Common Sense Solutions, Inc., Atlanta, Georgia

Vivian Wright draws on more than 20 years experience in the trust departments of Atlanta's top banks to lead the team of professionals at Common Sense Solutions. Wright began her career at First National Bank of Atlanta, now Wachovia Bank, earning a Certified Trust and Financial Advisor (CTFA) credential in 1992. After fourteen months with Bank of America forming a new division, Wright joined SunTrust Bank Wealth Management as an Assistant Vice President where she managed over \$122 million in trust assets. Positions of greater responsibility followed at SouthTrust Bank and First Union. Wright launched Common Sense Solutions in 2001 with the goal of serving and protecting elderly and disabled people who need help managing their monetary affairs. Her mission is to combine the internal controls and safeguards of a bank trust department with her personal emphasis on honesty, accountability, confidentiality and fiduciary duty to serve the client's best interest. She has steadily grown the company to its current size, managing the cash flow from approximately \$49 million in client assets.