

Are you tired of the stress from maintaining your home. Are you ready to downsize, to avoid dealing with a plumbing crises, or the headache from your appliances always breaking down.

If you are moving for health reasons or just to simplify your daily life, relocating can be an overwhelming task. When your home is overflowing with sentimental items from years of collecting and travel contact Wise Management and Financial Services. We provide a personal assistant management service to simplify your move to your new home.

Management Services available for your Relocation:

- We inventory the home content.

This list is catalogued so the home owner and family members, have the opportunity to choose selected items of sentimental value.

- We then pack and schedule delivery of items for resale or for donation to a charity of your choice.

- Oversight, from removal of all home content, scheduling and supervising cleaning, maintenance, or rehab, where necessary, with a fresh coat of paint prior to listing the home for sale. Whether the home requires remodeling or only painting, we manage the whole process so that you have the opportunity to possibly receive the best remuneration for your asset.

- We offer a personal executive assistant service to relocating Baby Boomers to assist you with sorting through confidential personal papers stored in your home. On request, we will liaise with your CPA and Estate Attorney to arrange delivery of the documents they require.

"Over the last three years it has been my pleasure to work with Karin Wise. Karin came to me highly recommended - with regards to her financial skills and expertise in caring for the elderly and seemed perfect for the overseeing of the care of my parents. At minimum Karin is reliable and honest beyond words. You will need these traits if you have ageing and ailing parents as I did, because things happen hourly/daily that you cannot possibly prepare for, and you wont be prepared. My nickname for Karin is :the bulldog." And, whenever I had any issue with anyone

for any reason relating to my parents, their care, their bills, their welfare and their well being knowing that Karin: "the bulldog" was there to resolve it let me sleep easier. As a final endorsement I have continued to retain Karin as an advisor to help me with my personal affairs even after the demise of both my parents."

David Flynn, Western Regional Sales Manager at Penhall Company

We respect our client emotional needs during this time of upheaval and ensure to provide excellence with our personal assistant concierge services. We undertake only a certain amount of projects annually which allows us to nurture our clients, to reduce their stress so that they feel in control during their relocation process.

Please Contact: Questions@onewiseadvisor.com or call 858-350-5350

Are you worried that you do not have enough savings to cover your living expenses during your retirement. Are you struggling to reduce your living expenses, or adhere to your retirement budget? Are you wondering if you should downsize your home and will this help you reduce your living expenses? Is your home compatible with your health challenges, or does your home have stairs?

Relocation Management Services: Relocating to a new residence is overwhelming, but, necessary when you need to reduce your monthly cost of living. The challenge starts with how to budget for the move, and then how to fit all your "stuff" in a smaller space. Wise Management and Financial Services work with you in drafting your own customized personal budget, and provides solutions as well as guidance prior to planning any move.

Personal Executive Assistant services: We assist you with organizing confidential personal papers, and liaising between your Accountant (CPA), Tax Preparer and Estate Planning Attorney, to fast pace the process for locating pertinent tax documents required for annual tax return preparation. We have the knowledge to search out and gather the required supporting documents needed by your legal counsel for preparation or updating of your Estate Plan, Living Will, Revocable Trust and Health Care Directive.

Please call for further information or to request a brochure be mailed to you.