

Background

CASH In Balance, LLC's owner, Catherine A. Schramka Heidemann, is an accounting professional with over 25 years of experience.

Catherine graduated Magna Cum Laude with her bachelor's degree in Accounting from Lakeland College and also has a major in Management Information Systems from UW-Milwaukee.

She started her career paying bills and reconciling check-books for Schramka Funeral Homes.

Catherine is a member of the American Association of Daily Money Managers and adheres to AADMM's Code of Ethics and Standards of Practice.

Contact Us

CASH In Balance, LLC
Catherine A. Schramka Heidemann, Owner
PO Box 320703
Franklin, WI 53132
Phone: 414.217.4510
catherine@cashinbalance.com

Visit our website at www.cashinbalance.com

We come to you!

Background

CASH In Balance, LLC's owner, Catherine A. Schramka Heidemann, is an accounting professional with over 25 years of experience.

Catherine graduated Magna Cum Laude with her bachelor's degree in Accounting from Lakeland College and also has a major in Management Information Systems from UW-Milwaukee.

She started her career paying bills and reconciling check-books for Schramka Funeral Homes.

Catherine is a member of the American Association of Daily Money Managers and adheres to AADMM's Code of Ethics and Standards of Practice.

Contact Us

CASH In Balance, LLC
Catherine A. Schramka Heidemann, Owner
PO Box 320703
Franklin, WI 53132
Phone: 414.217.4510
catherine@cashinbalance.com

Visit our website at www.cashinbalance.com

We come to you!



CASH In Balance, LLC

Daily Money Management
for Individuals



Catherine A. Schramka Heidemann,
Owner & Daily Money Manager

Insured & Bonded
Free Initial Consultation

Member of
AADMM
American Association of
Daily Money Managers



CASH In Balance, LLC

Daily Money Management
for Individuals



Catherine A. Schramka Heidemann,
Owner & Daily Money Manager

Insured & Bonded
Free Initial Consultation

Member of
AADMM
American Association of
Daily Money Managers

What is a Daily Money Manager?

A Daily Money Manager (DMM) provides assistance to individuals with their day-to-day finances. Whether you are too busy, a senior citizen or anyone who may need a little guidance, a DMM will be able to assist you.

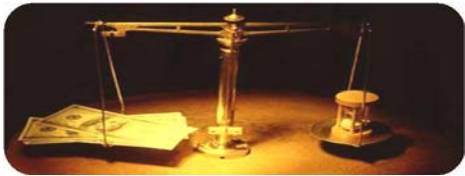
DMMs work in partnership with your CPA/tax accountant, attorney or financial advisor by assisting in organizing and maintaining financial records.

How can a DMM help me?

DMM services are tailored around you. DMMs will:

- ◆ organize your personal financial situation
- ◆ save you time, money, and effort
- ◆ allow you and your advisors to make informed decisions

These services translate into cleaner recordkeeping, improved clarity and better understanding of your financial position.



Save Time & Money with CASH In Balance, LLC

What is a Daily Money Manager?

A Daily Money Manager (DMM) provides assistance to individuals with their day-to-day finances. Whether you are too busy, a senior citizen or anyone who may need a little guidance, a DMM will be able to assist you.

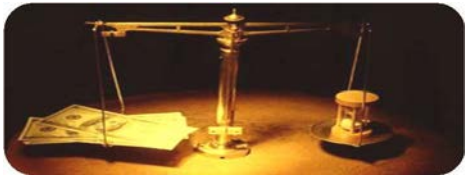
DMMs work in partnership with your CPA/tax accountant, attorney or financial advisor by assisting in organizing and maintaining financial records.

How can a DMM help me?

DMM services are tailored around you. DMMs will:

- ◆ organize your personal financial situation
- ◆ save you time, money, and effort
- ◆ allow you and your advisors to make informed decisions

These services translate into cleaner recordkeeping, improved clarity and better understanding of your financial position.



Save Time & Money with CASH In Balance, LLC

Personal Finances

Our personal financial services include the following and are customized to meet your needs:

- ◆ Paying bills by preparing checks
- ◆ Opening and organizing mail
- ◆ Balancing/reconciling checkbooks
- ◆ Preparing and delivering bank deposits
- ◆ Budgeting and cash flow management
- ◆ Monitoring and reconciling credit card activity
- ◆ Maintaining financial files for CPA/tax accountant, attorney, or financial advisor
- ◆ Deciphering medical insurance paperwork and verifying proper processing of claims
- ◆ Handling vendor payment questions and disputes with the assistance of the client
- ◆ Advocating on behalf of the client to connect with other service providers
- ◆ Referring and interacting with professional advisors on the client's behalf

Personal Finances

Our personal financial services include the following and are customized to meet your needs:

- ◆ Paying bills by preparing checks
- ◆ Opening and organizing mail
- ◆ Balancing/reconciling checkbooks
- ◆ Preparing and delivering bank deposits
- ◆ Budgeting and cash flow management
- ◆ Monitoring and reconciling credit card activity
- ◆ Maintaining financial files for CPA/tax accountant, attorney, or financial advisor
- ◆ Deciphering medical insurance paperwork and verifying proper processing of claims
- ◆ Handling vendor payment questions and disputes with the assistance of the client
- ◆ Advocating on behalf of the client to connect with other service providers
- ◆ Referring and interacting with professional advisors on the client's behalf