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Caymus Financial

Because Doing The Right Thing Matters

● Founder & CEO
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Member of

ADMM

American Association of Daily Money Managers

required.

Refer clients to other service providers or consult with the other service providers when additional knowledge and expertise are educated and properly licensed.

Accurately represent their professional experience and training and shall not act in any capacity for which they are not separately Achieve and maintain high standards of competence.

formed.

Protect the client's right to privacy and confidentiality in accordance with the laws of the state where the services are performed.

Respect the rights of their clients.

Treat clients, their family members, colleagues, and other professionals with fairness, discretion and integrity.

Have concern for the well-being of their clients.

finances.

who need help managing their personal monetary and/or business

As Daily Money Managers (DMMs), we provide assistance to clients to promoting high standards of client services provided by its members.

The American Association of Daily Money Managers is committed

OUR CODE OF ETHICS

WE STAND BY

INTEGRITY

FAIRNESS

DISCRETION



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DAILY MONEY MANAGEMENT

Because Doing The Right Thing Matters

Contact us today for your FREE consultation

our mission:

TO PARTNER WITH OUR
CLIENTS AND PROVIDE
MANAGEMENT OF THEIR
DAY-TO-DAY FINANCIAL
TRANSACTIONS



HIGH STANDARDS OF
COMPETENCE

KEEP CURRENT WITH
CHANGING INDUSTRY
RULES

INSURANCE AND
LICENSES ALWAYS UP
TO DATE

WE HAVE GENUINE
CONCERN FOR OUR
CLIENTS WELL BEING

WE TAKE DIRECTION
FROM YOU

ALWAYS RESPECT
THE RIGHTS OF OUR
CLIENTS



Contact us today
for your *FREE*
consultation



OUR EXPERTISE. YOUR PEACE OF MIND.

ALLOWING US TO PARTNER IN DAY-TO-DAY MONEY
MANAGEMENT WILL ALLEVIATE STRESS AND WORRY

A Daily Money Manager (DMM) is a person who performs day-to-day financial trans-
actions for any individual, family, military veteran, busy professional or small business
that is unable, does not have the time or desire to perform those tasks themselves.

KEEPING FINANCES IN ORDER
THROUGH STRATEGIC MANAGEMENT,
DECISION IMPLEMENTATION AND
PRECISE EXECUTION

- **Bill Paying**
- **Balancing Checkbooks**
- **Credit Card Statement Reconciliation**
- **Preparing and Delivering Bank Deposits**
- **Budgeting**
- **Assembling Tax Documents**
- **Medical Bill Investigation**
- **General Organization Assistance**
- **Providing Referrals to Legal, Insurance,
Investment and Tax Professionals**
- **Mobile Notary Services**

**BECAUSE DOING THE
RIGHT THING MATTERS**

The Story....my Mom was always a very independent person who I thought would never age, but as she got into her 70's, her attention to detail started to slip and she was missing payment dates, incurring late fees and frequently would miss paying a bill entirely. One day, I found my Mom sitting at the kitchen table in tears. She handed me a letter from the life insurance company of a \$250,000 policy (that she had been paying on for 17 years) that was terminated due to non-payment.

This is when I stepped in to help and what started out as an extra set of eyes on things turned into full man-
agement of her daily finances for the next 10 years. This allowed her to reclaim her independence without worrying about getting all her payments made on time.

There are other individuals, families, military veterans and busy professionals that need help like my Mom did and that is why I started Caymus Financial Services. I'm paying it forward in my Mom's honor "BECAUSE DOING THE RIGHT THING MATTERS".

-Diane Remaly, Founder & CEO
Caymus Financial Services