

David Lutzer
Owner and Founder of Your Personal Assistant.

Professionally Serving The Senior Community for 20 Years
www.yourpersonalassistantnyc.net 212.727.2825 dlutzer@earthlink.net

Services Provided

Taxes & Financial:

- Set up and maintain bookkeeping systems and pay bills.
- Liaison with accountants to ensure deductions and refunds.
- Liaison with brokers and financial planners on purchases and sales of stocks.
- Recovery funds from federal and state agencies, successfully recovered \$200,000.00 in unclaimed funds and benefits.

MEDICAL & HEALTH BENEFITS:

- Advocate for medical reimbursement from insurance companies and public agencies.
- Managing client's medical billing and insurance reimbursement claims.
- Dispute settlement with Medicare and insurance companies.
- Setting up long term insurance and submitting claims.

FILING & HOME MANAGEMENT:

- Supervise and manage staff.
- Set up appointments and accompany clients to doctors, lawyers and accountants.
- Create and maintain filing systems.
- Set up a move including notifying utilities and organizing new apartment.
- Sorting mail for important items and discarding unimportant items.

LEGAL:

- Certified Paralegal and Notary Public.
- Expertise in drafting documents, Power of Attorney, Health Care Proxy & Living Wills.
- Referring elder care attorneys, accountants and other professionals.

Advocacy:

- Assist clients in dispute settlements with - Family, Medical, Financial and Legal Matters.

Senior Agencies- Work with and referred by Dorot, Jasa and Greenwich House.

For references and testimonials please refer go to [yourpersonalassistantnyc.net](http://www.yourpersonalassistantnyc.net)