wealth management

REDW Stanley expertise.

eldercare & family office administration

Contacts

Ginny Stanley
505.998.3216
gstanley@redw.com

James "Chip" Dennedy
505.998.3234
cdennedy@redw.com

America is aging and families are more mobile. As we grow older or see our parents age, we worry about the ability to make informed financial decisions, pay bills, protect assets and find dependable help or housing—whether for them or ourselves. The eldercare specialists and family office administrators at REDW Stanley can help. Our team of CPAs and Certified Financial Planners will lead you through some of the difficult decisions regarding finances and the elderly.

HOW WE CAN HELP

- Tax preparation and advice
- Bill paying
- Trust administration (for our clients only)
- Conservatorship
- Family financial meetings
- Managing investments
- Appropriate gifting and charitable funding
- Estate administration
- Appropriate titling of assets
- Housing information
- Geriatric referrals
- Eldercare legal referrals

WHY REDW STANLEY?

We are fiduciaries. Simply put, this means we have a legal obligation to place our clients' needs above our own. We don't sell products, so there won't be any sales pitches. We are regulated by the State Board of Public Accountancy, the Certified Financial Planners Board of Governors, and the Securities and Exchange Commission, among others. The many credentials our team members have earned demonstrate their commitment to professional excellence. Of course, these aren't the only reasons to consider REDW Stanley for your eldercare needs, but we think they're some of the best.