AADMM

American Association of Daily Money Managers

The American Association of Daily Money Managers

What is AADMM?

- AADMM is a nationally recognized professional association of daily money managers (DMMs).
- AADMM supports the growth of our industry, in the number of providers, in recognition of the field, and in the quality of services provided.
- AADMM provides educational resources for professionals and the community on daily money management services.

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What do AADMM members do?

- Bring clarity and order to managing personal or business bills, budgets, and records.

- Serve as trusted professionals to help with your daily money matters.

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Scenario 1: Senior

Client demographics:

- Couple: husband was 85 years old & wife was 83 years old
- He had terminal cancer (he died in 2020; she died 2026)
- He took care of all family finances
- She suffered from cognitive decline, especially near the end
- Lived independently, with outside caregiver support

Scenario 2:
High Net Worth Busy Professionals

Client demographics:

- Married couple in 60s; 3 grown children; couple grandchildren
- Three homes, five cars, multiple club memberships
- Residents in two different states
- Multiple bank and credit card accounts
- Manage complex QuickBooks accounting for client
- Have household employees
- Been victims of fraud

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AADMM members assist clients in:

- Bill paying
- Day-to-day banking
- Budgeting
- Medical claims management & insurance paperwork, including long term care
- Financial records organization
- Income tax records and receipts organization, in preparation for annual filing

Typical clients include:

- Older Adults
- Individuals with physical/cognitive challenges
- Busy professionals
- Frequent travelers, or individuals who travel for extended time periods
- Small businesses
- Veterans
- Estates

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Why choose an AADMM member?

- AADMM members have established credibility within the industry and exhibit a commitment to professionalism.

- AADMM members have access to continuing educational events and resources including conferences, webinars, regional groups meetings and more.

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Why choose an AADMM member?

Continued…

- Members have undergone background checks and must adhere to a strict code of ethics and standards of practice.
- AADMM promotes excellence in services through a voluntary certification program that emphasizes both experience in the field and continuing education.

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AADMM members are committed to:

- Excellence in service and professionalism
- Adherence to a strict code of ethics
- Promoting best practices within the industry
- Client confidentiality

AADMM members offer peace of mind:

- By professionally managing your financial responsibilities when you don’t have the time or expertise.
- By advocating for your financial welfare.
- By easing the burden for “sandwich generations” caring for aging parents while raising their own families.

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AADMM members are relationship builders:

AADMM members help you find and coordinate services with other professionals to meet your full range of financial and personal needs including:

- Accountants/CPAs
- Elder law and estate planning attorneys
- Financial advisors
- Care managers
- Social workers

AADMM members can be found:

- On the AADMM website (www.aadmm.com), by clicking on the "Find a DMM" link.

How AADMM members are engaged:

- Complimentary Consultation
- Signed Agreement
- Paid Hourly or Fixed Rate

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When to call a DMM:

- Overwhelmed with Paperwork
- Forgetting to pay Bills
- Fearful of being Scammed
- Difficulty with Financial Tasks
- Worried about Overspending

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AADMM members are trusted professionals helping you navigate bills, budgets, and record keeping.

www.aadmm.com