



MONEYWISE 365

A division of PS Worth



WE PROVIDE DAILY MONEY MANAGEMENT FOR FUN PEOPLE!

We take the hassle out of daily money management. From bill paying and organizing tax documents to reviewing health insurance claims and more, we handle the details so you can focus on what matters most.

www.moneywise365.com





4 REASONS TO CHOOSE US

1. Transparency & Accountability

Clear Service Agreements – We provide detailed contracts outlining exactly what we do, with no hidden fees or surprises.

2. Trusted Oversight & Security

Collaboration with Estate Planners, CPAs & POAs – We work with your existing financial team to ensure alignment and oversight.

3. Licensed, Insured, and Experienced

Professional Background & Certifications – With years of experience in financial management, we adhere to the highest ethical standards.

4. You're Always in Control

You Approve All Payments – No money is moved without your consent or a pre-approved plan.

OUR SERVICES

- ▶ Bill Paying
- ▶ Expense Tracking & Account Reconciliation
- ▶ Document Organization & File Management
- ▶ Financial Check-Ups
- ▶ Cash Flow, Budgeting & Debt Management
- ▶ Collaboration with Other Professionals



**To begin, contact us
call or schedule a free phone consult**



**We will learn about you and the
services you are looking for**



**Together we will decide on a plan to
help**



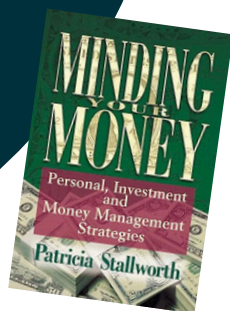
**We will implement the plan
You get to start enjoying peace of mind!!!**

ABOUT US

We specialize in working with people who want peace of mind that their daily personal money tasks are handled so they can focus on their lives and the things that matter most to them.

Patricia Stallworth, MBA, CFP®, is the CEO/Founder of PS Worth — a financial planning, education, and management firm.

She has 20+ years in financial planning and is dedicated to helping others streamline their finances, maximize earnings, and achieve their life goals. She is the author of *Minding Your Money*, and she has been featured in numerous publications, including Business Insider and GoBankingRates.com.



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