



SIDEDRAWER™

Case Study

# Meet Jill Chambers from Financial Concierge

Empowering Seniors to Age in Place

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Jill Chambers, the founder and president of Financial Concierge, sat down with us to discuss how using SideDrawer has improved her highly professional, open communication approach to aging, and estate planning and administration.

## What is Financial Concierge?

Financial Concierge offers expert, individualized, private daily money management assistance, both in-home when practical and remotely when necessary. The team is passionate about improving the lives of elders, filling a specific, critical financial service need – which is to take care of elders' everyday financial tasks, allowing them to age in place. Services include daily money management, document management, and estate administration. Financial Concierge acts as a person's personal Chief Financial Officer, ensuring that payments are made for bills and cheques. Inspecting bank and credit card statements allows them to keep an eye out for fraud, double billing, and missing payments. The team behind Financial Concierge is happy to be one of the few in Canada practicing this newly-emerging profession and to provide this increasingly critical service.

Financial Concierge has a fee-for-service model and they work closely with financial advisors, accountants and lawyers who refer clients, or senior family members of clients who can benefit from their service.



Financial Concierge's Family Playbook<sup>®</sup> is an effective document organizer that keeps crucial financial and personal data organized in one location. When a neutral third party is preferable, Financial Concierge can help executors and powers of attorney fully undertake these tasks on their behalf.

Financial Concierge is a member of CARP (formerly known as the Canadian Association of Retired Persons), the largest advocacy association for aging Canadians; AADMM, the American Association of Daily Money Managers; with a number of Financial Concierges<sup>™</sup> holding the Certified Financial Planner (CFP) designation.

Their daily money management, document organization, and wills and estate services complete the circle of care required for elders to age in place with freedom and dignity when paired with the collaborative work they conduct with clients' caregivers and advisers.

## **Founder Jill Chambers**

Jill has years of expertise as a financial planning specialist and a wealth of experience working in healthcare with elders and vulnerable people. She is a supplier of services who is dedicated to efficiency, organization, financial literacy, and informed consent. Jill's experience is a result of her nursing education, as well as the various financial designations, including the CFP, CIM, CEA, and the CFDS.

## Financial Concierge – The Challenge

Jill noted that the main issue facing Financial Concierge involved the proper and efficient storage and management of personal information. Given her organization's industry and niche, Financial Concierge would handle personal and sensitive information such as account numbers, pin numbers, passwords, financial documents, estate information, and much more.

"When we first started, we used a CRM system where we stored notes, the records of our phone calls, tracked all of our time, etc," Jill said, "But we were feeling a little uncomfortable about having any sort of personal information in there. So, we created a trademark and we called it a 'Family Playbook.' That's our format, our organization of personal financial documents. We created this in a hardcopy, and we gave it to the client to keep with the idea that every year we'd meet with them and review it."

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Naturally, Jill saw a pretty glaring flaw in that system – it isn't the most secure approach to handling sensitive information, both on the client side and the firm side, but also, in many cases, it was the only record.

"The main issue with that system," said Jill, "Because if I'm named as the primary executor, and if that binder goes AWOL, I'm no further ahead when I have to step in as executor or power of attorney."





## The Solution

SideDrawer offers a solution to Financial Concierge's document management problem by providing an easy-to-use platform on both the client and the firm end of things.

"SideDrawer has been just an absolutely perfect fit for us," Jill gushed, "Now when it comes to our processes, we create the hardcopy binder, because most of our clients are older adults, and some still want that physical paper. But now, we scan and upload client information and documents to a secure online server, which you can access and you can identify who else you'd like to access it. Very often, we see family members being added – so there is a network effect of growing our brand and awareness amongst other family members. And when we meet annually, we review the hardcopy make sure things are current there, and we'll also review the information that is online."

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This is a unique but ultimately effective approach to document management when it comes to working with older individuals in a trusted advisory capacity. Jill's organization still uses the physical binder for the Family Playbook™ – but all of that valuable and sensitive information is also stored on SideDrawer's extremely secure platform.

Jill noted that she also appreciated SideDrawer's approach to customer support.

"Everybody is terrific to work with," said Jill, "And if we can't solve [a problem] in that first call, they're great about working on it until we get it figured out."

We're excited to see how Jill and Financial Concierge continue to use SideDrawer for their document management!



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## What is SideDrawer?

SideDrawer is a cloud platform that provides financial advisors and individuals services to ensure online document sharing security. It is designed as a physical filing cabinet but with amplified safety. As a result, it benefits organizations and their clients by reducing expenses, time, and resources.

SideDrawer is the perfect solution for organizations dealing with confidential information through email. Financial advisors can send and receive sensitive documents without the risk of forwarding them to the wrong person. Additionally, SideDrawer is protected with several firewalls to secure clients' data completely. Therefore, it is an excellent alternative for financial advisors and their clientele.

In a nutshell, SideDrawer is the solution to all documentation problems. It presents a unique opportunity to increase work efficiency using better workflow, all-in-one-place digital document storage, and virtual problem solving faced by financial advisors. This helps promote a better user experience.

Excited to know what SideDrawer can do for your business?

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