

We believe  
"Money Managers"  
shouldn't be just for  
the rich & famous.

We do all the heavy lifting  
in your financial life so you  
can avoid pitfalls & achieve  
your goals faster - all while  
having more time to spend  
on what you love.

## How We Work



### contact us

(724)-359-5022

[lauri@paxtonbookkeeping.net](mailto:lauri@paxtonbookkeeping.net)  
[paxtonbookkeeping.net](http://paxtonbookkeeping.net)

# Our Process

## 1. Strategy



We analyze key data in your financial picture.



We focus only on the things that will help you reach your goals.



We use your action plan as the focus of our work throughout the year.

## 2. Management



We execute your top priority first to ensure you make the most progress in the shortest time.



Your compliance needs are automatically addressed throughout the year.



All your critical financial goals are taken care of in one place.

## 3. Service



All the help & guidance you need for an affordable, monthly payment.



Your Solutions Manager works hard all year to get you where you want to go, faster.



Never pay for "time" again! VIP phone, email, & video access to your dedicated team.