



NEVER TOO OLD *to Laugh*

BY BARBARA BOUSTEAD

Laughter is the best medicine, an old adage I refer to in my work with seniors and veterans. It’s important to maintain optimism and a sense of humor when assisting clients with finances, especially when they’d prefer handling their own.

Mary’s Daughter began in 2011 and was named after my mom, Mary Hyatte, who passed away in 2014 at the age of 93. When I had helped her with advocacy and bill paying, I realized I enjoyed it. After some research, I discovered that what I was doing had a name—daily money management—and that there are many who provide this type of service who belong to

the American Association of Daily Money Managers.

My first client was in her late 90s. She had been scammed out of her retirement savings by her grandson, and because of the loss, she had to move out of the residence she loved into a more affordable facility. I met with her twice a month to open mail and pay bills, and I enjoyed her stories of world travels and laughed about her problems with “new-fangled gadgets,” like cell phones and the internet.

Another client was in his early 70s, and was referred by his brother because of financial management concerns—the

client had developed malignant brain tumors, which caused dementia. The client and I would sit at the kitchen table while I organized paperwork and paid bills. After my work was completed, he’d happily take me on a walk in his garden. He was an avid gardener who laughed at my lack of knowledge about the flowers he’d planted. Eventually, he transitioned to a memory care facility, where I’d visit with flowers from his garden. He always smiled at the flowers, even though he couldn’t always identify them like he once could.

I was asked to help a woman in her 80s because she was causing

problems at her apartment complex with numerous demands for help with her phone. It turned out she was suffering from dementia and her phone service had been terminated due to nonpayment. Prior to this, she’d been extremely organized and paid her bills on time.

While organizing this client’s paperwork, I found a large uncashed check. This caused us to laugh, and she joked that I needed to keep looking for treasures. Then when it was time to file her taxes, I asked her CPA about medical expense deductions. He’d been doing her taxes for three years without knowing she had high premiums. With this new information, my client received a \$9,000 refund. I also asked him to file amended returns for the previous three years, which netted her an additional \$3,000. She was very excited to receive the windfall, and so was I.

Although I experience much joy in my work, it can be quite challenging. When a client passes away, it’s like losing a family member. But it’s important that my clients and their families don’t have to worry. Many families share that they experience more joy and peace of mind knowing the tasks are being expertly handled by a trusted and caring professional.

I believe I’m using my spiritual gifts and doing what my mom wants me to do. I truly believe she’s smiling and saying, “Good job, Barbara.”

Barbara Boustead is the owner of Mary’s Daughter LLC.



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