



## Qualifications

Condit and Associates, LLC was founded in February of 2004 by Mary Jane Condit, Principal Licensed Fiduciary, CTFA, MBA and NCG with over thirty years of experience in estate, trust, special needs and elder services. In January of 2014 Valerie J. Mills, Licensed Fiduciary, CTFA, NCG and Vice President along with R. Nicole Cundiff, Licensed Fiduciary, NCG and Vice President became joint owners with Condit. Mills and Cundiff each bring over seven years of trust, estate, special needs and elder services experience.

Condit and Associates Professional Fiduciaries and Staff are comprised of many years of solid experience; National Certified Guardians, Cannon Trust School graduates with certifications in trust, estate law, and taxation; medical and human service professionals such as Registered Nurses.

Member of the —

- Arizona Fiduciary Association
- National Guardian Association

Professional Supreme Court Licensed Fiduciaries plus experienced and trained support staff are ready to proudly and professionally service residents of our communities.

For more information or to schedule a complimentary appointment contact us at 623-546-6082.

## Financial and Care Management Administrative Services

*Location by appointment:*

**Condit and Associates, LLC**  
Arizona Licensed Fiduciaries  
13912 W. Stardust Blvd. Suite #200  
Sun City West, AZ 85375

**Phone: 623-546-6082**  
**Fax: 1-877-784-6938**

**Email:**  
mjcondit@conditandassoc.com

For more information about Condit and Associates visit us on the Internet at <http://conditandassoc.com>

*Helping Adults  
Live Independent,  
Simple  
and Carefree Lives!*

# Condit and Associates, LLC



**Arizona Licensed  
Fiduciaries**

## Our Mission

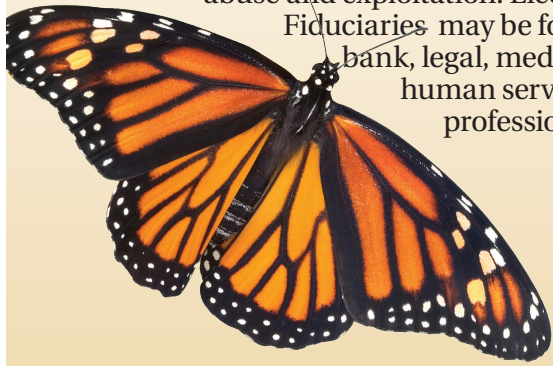
To provide professional, dependable, financial and personal care services for those who want life to be simple, easy, or no longer a struggle. To give respect and honor the dignity and livelihood of those who have raised, nurtured and mentored the rest of us.

## What's a Licensed Fiduciary?

A fiduciary is someone entrusted to protect property, oversee matters and manage care when a person is unable to do so for him/herself.

Licensed Fiduciaries have been tested, background checked, bonded, fingerprinted and licensed through the Arizona Supreme Court. They are held to a high standard under the law and are accountable to their clients/wards, their families and the courts.

Fiduciaries are advocates for the clients they serve and help protect them from abuse and exploitation. Licensed Fiduciaries may be former bank, legal, medical or human services professionals.



## Medical Care Management

Our clients benefit from a team of expert medical professionals such as Geriatric Care Managers, Registered Nurses (RN) Licensed Nursing Assistants (CNA) and in-home care and health care agencies. Our professional team works privately with elders, challenged adults, and their families. Services such as Needs Assessments, Care Plan Development, Care Provider Management and medications management are some of the services provided.

## Financial Management

Keeping the finances organized, current and in good standing is important. We work with your investment advisor, income tax preparer, and attorney to provide objective investment management oversight, accounting services, legal services and make sure your tax preparer receives your tax consequence information for return filings.

## Property Management

Our professional Property Manager, maintenance and support technicians as well as Licensed Fiduciaries and Support staff can work with you to make your life easier and worry-free. Maintaining real estate and personal property can be stressful with age, traveling, extended absences or a permanent move. Having someone to check on your property is a relief from worry as you enjoy your time away. Having someone to assist you find a new living location, move from one place to another and assist with some or



all of the arrangements can reduce the overwhelming chore of deciding what to keep, sell or gift as well as the actual move. Knowing someone to call when repairs and maintenance are needed from trust-worthy professionals can be a comfort. When you want to arrange for shipment of your precious collections, sentimental items and/or family heirlooms or simply have someone sort through your records and determine what should be saved, shredded or disposed of can take away the burden.

## Fiduciary Appointments

Appointments may be accepted to serve in the following capacities:

- Durable Power of Attorney
- Health Care Power of Attorney
- Mental Health Power of Attorney
- Trustee and Successor Trustee
- Estate Personal Representative
- Conservator and/or Guardian
- Agent to any of the above
- Other services such as bookkeeping and Care Management