



## Who Calls Upon CSI?

Attorneys, Courts, CPAs and Trust Officers

Families, Friends and Caregivers

Senior Living Communities and Physicians

Social Workers or Government Agencies



**CSI COORDINATES  
AMONG ALL PARTIES**

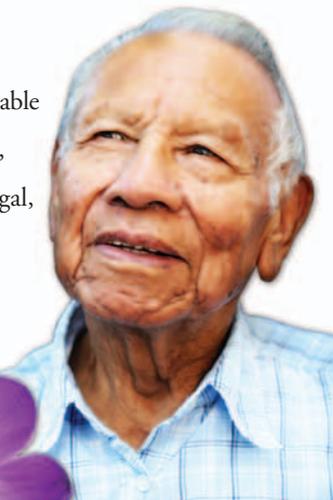


Client's Case Manager or Social Worker

Client's CPA, Attorney and Banker

Client's Real Estate Agent or Financial Advisor

CSI provides speedy, accurate and reliable financial services to family members, caregivers and professionals in the legal, healthcare and financial industries.



## CSI's Mission

To assist Hawaii's elders and people with disabilities to maintain or achieve a comfortable, secure and independent lifestyle through individualized daily money management and related asset management.

CSI is a private, nonprofit 501(c)(3) agency with highly trained financial case managers. Since 1987, CSI has provided financial services for the elderly and adults with disabilities. It is a safe, secure, reliable option for reasonably priced financial services.

CSI is affiliated with the following groups:

American Association of Daily Money Managers

National Guardianship Association

Hawaii Association of Case Managers

Hawaii Community Services Council



csi inc

comfort.security.independence

Financial and Protective Services  
for the Elderly and Adults with Disabilities

SINCE 1987

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[www.csihawaii.org](http://www.csihawaii.org) | [shindomen.blogspot.com](http://shindomen.blogspot.com)  
[www.thecaregiverfoundation.com](http://www.thecaregiverfoundation.com)

# FAQs

Caring for seniors or adults with disabilities is an honorable undertaking. Oftentimes, providing this care can lead to taking financial oversight, especially when the senior has limited assets and insufficient capabilities to do so themselves.

CSI, Inc. (Comfort, Security, Independence) is a fiduciary agency whose highly trained financial staff specialize in managing the financial affairs of the elderly or adults with disabilities. Because CSI caters exclusively to this group, it can uniquely navigate the complex financial challenges often faced these individuals.

Since 1987, CSI has safeguarded the financial assets of those who may be vulnerable to financial loss by providing the following services:

- Bill Payment and Mail Screening
- Health Insurance Filing
- Bill Negotiation
- Monthly Bank Reconciliation
- Record Organization and Reporting

*“When my mother’s CPA recommended CSI take care of mom’s bills, it gave us peace of mind. Now we focus on spending quality time with her instead of chasing down her bills and worrying whether they’ve been paid.”*

– Joanne Watanabe  
Honolulu, HI



(left to right)  
Gladys & Joanne  
Watanabe  
and Emma Joli

## **Why should I trust CSI?**

CSI is like a trust division of a bank. It is a fiduciary organization which is regulated and audited for best practices in financial oversight. It has an experienced, reliable staff with a track record of success.

## **How can CSI help?**

CSI helps protect the assets of those who may be vulnerable to financial loss by providing oversight. CSI provides fast and accurate personal bookkeeping and acts as a neutral third party in handling family assets. Professionals use CSI because it is knowledgeable, fast and accurate. Families use CSI because it allows them to focus on their loved ones instead of their loved one’s financial affairs.

## **How does CSI charge?**

CSI charges an affordable hourly fee for its services.

## **Does CSI take control of the assets?**

No. The original owner of the assets remains in control. CSI simply handles the transactions and provides reliable oversight.

## **How safe are the assets? Can they be lost or stolen?**

CSI is never in direct possession of financial assets. Instead, assets are kept in FDIC-insured financial institutions.

## **Does CSI make investments or do taxes?**

No. It is in the client’s best interest that CSI work with their attorneys, CPAs and investment advisors. CSI is not a replacement for these professionals. Instead, CSI focuses on its highly specialized area of expertise – bill management.



## **Does CSI provide social services or nursing care?**

No. CSI works with these professionals as necessary, but remains focused on its area of expertise – bill management.

## **How can I get help for someone with dementia?**

In order for CSI to accept a client with dementia, a family member or guardian must already have legal authority to make financial decisions on behalf of the client.

## **What happens if the assets run out?**

If assets run out, CSI will ensure the client is properly transitioned to another organization which can properly care for the client such as the Small Guardianship.

## **How often does CSI send financial reports to the family?**

Reports are sent at any time upon request.

## **How do I sign up for CSI’s services?**

Contact Evelyn Fonseca, Executive Assistant to CEO, at (808) 538-0353 or email Evelyn at [evelynf@csihawaii.org](mailto:evelynf@csihawaii.org)