



## PDMM® EXAM STUDY MATERIALS

Although this list of books may include more than one book that covers a particular content area, one such reference may be enough. You may also have resources available that are not on the list but will adequately cover the content area. You should review each content area and the explanatory sub-content areas to ascertain if you have material other than the books that appear below that would enable you to prepare for the examination. Web sites are also provided below which may augment or be in lieu of a particular book below.

### General Common Knowledge

The examination also pertains to a common body of knowledge for the Daily Money Management profession; thus the reference list below does not warrant or guarantee that all information is contained in these references.

#### AADMM Code of Ethics

#### AADMM September 2007 Newsletter

**Professional Daily Money Manager Certification Study Guide**, available through the AADMM Bookstore

Ken Little, **Personal Finance at Your Fingertips**, ISBN: 1592576443, July 2007, Publisher: Penguin Group

Jeff Opdyke, **Wall Street Journal Personal Finance Guidebook**, ISBN: 030733600X, April 2006, Publisher: Crown Publishing

Joseph L Matthews, Dorothy Matthews Berman, **Social Security, Medicare and Government Pensions: Get the Most Out of Your Retirement and Medical Benefits**, ISBN: 1413305768, April 2007, Publisher: NOLO

Linda Pinson, **Keeping the Books**, ISBN: 1419584383, January 2007, Publisher: Kaplan Publishing

David A. Flannery, **Bookkeeping Made Simple**, ISBN: 0767917065, May 2005, Publisher: Broadway Books

Melanie Culler, Shae Irving, **Get It Together: Organize Your Records So Your Family Won't Have To**, ISBN 1413305636, March 2007, Publisher: NOLO

Stephen Fishman, **Working for Yourself: Law and Taxes for Independent Contractors, Freelancers and Consultants**, ISBN: 1413304400, February 2006, Publisher: NOLO

John H. Fenton, **2007 All About Medicare**, ISBN: 0872189074, March 2007, Publisher: National Underwriter Company

Denis Clifford, Cora Jordan, **Plan Your Estate: Everything You Need to Know to Protect Your Love Ones, Property and Finance**, ISBN: 1413304060, March 2006, Publisher: NOLO

Jane Bryant Quinn, **Making the Most of Your Money**, ISBN: 0684811766, January 1997, Publisher: Simon and Schuster

Andrew Tobias, **Only Investment Guide You'll Ever Need**, ISBN: 0156029634, January 2005, Publisher: Harcourt

Lois A. Vitt, et al, **Encyclopedia of Retirement and Finance**, ISBN: 0313324956, November 2003, Publisher: Greenwood Publishing Group, Inc.

**[www.aarp.org](http://www.aarp.org)**

1. Money and Work
  - A. Financial Planning and Retirement
  - B. Social Security
  - C. Credit and Debt
  - D. Tax-Aide
  - E. Low-Income Help
  - F. Reverse Mortgage
  - G. Be a Wise Consumer
2. Health
  - A. Insurance
  - B. Medicare
  - C. Prescription Drugs
3. Other areas on this web site may also provide general background information

**[www.medicare.gov](http://www.medicare.gov)**

1. Medicare D
2. Insurance
3. Medicare and your Annual Booklet
4. Long Term Care

**[www.fdic.gov](http://www.fdic.gov)**

**[www.identitytheft.org](http://www.identitytheft.org)**

**[www.creditbureau.com](http://www.creditbureau.com)**

**[www.irs.gov](http://www.irs.gov)**

1. IRS Publication 15, Employers Tax Guide
2. IRS Publication 15-A, Employers Supplemental Tax Guide: Section 2 – Employee or Independent Contractor
3. Publication 17, Your Federal Income Tax
4. Publication 505, Sections 2 and 4: Tax Withholding and Estimated Tax
5. Publication 552, Recordkeeping for Individuals
6. Publication 926, Household Employers Tax Guide, “How do you make tax payments?”

**[www.irs.gov/businesses](http://www.irs.gov/businesses)**

1. Employment Taxes for Businesses

**[www.dol.gov](http://www.dol.gov) or [www.sba.gov](http://www.sba.gov)**

1. Workers Compensation Programs

Elder Abuse Center -

[http://www.ncea.aoa.gov/ncearoot/main\\_site/pdf/publication/DailyMoneyManagement.pdf](http://www.ncea.aoa.gov/ncearoot/main_site/pdf/publication/DailyMoneyManagement.pdf)

1. Daily Money Management Programs: A Protection Against Elder Abuse, National Center on Elder Abuse, Washington, D.C. June 2003

**[www.sec.gov/investor](http://www.sec.gov/investor)**

1. Beginners' Guide to Financial Statements

**[www.seniorresource.com](http://www.seniorresource.com)**

1. Senior Resources for Aging in Place

**[www.hud.gov](http://www.hud.gov) or [www.ftc.gov](http://www.ftc.gov)**

1. Reverse Mortgages

**[www.hipaa.org](http://www.hipaa.org)**

1. Health Insurance Portability and Accountability Act