

# **Money Management Program**

## **Volunteer Bill Payer – Job Description**

### **SUMMARY**

Bill Payer volunteers are matched with low-income individuals who are elderly or have a disability and need help managing their person household finances. Bill Payer volunteers typically meet in the clients home at least monthly or as needed to keep finances in order. The volunteer is not expected or authorized to sign checks or manage any other assets belonging to the client. The volunteer promptly notifies the program coordinator if the client needs additional assistance. The purpose of this activity is to enable the client to prolong an independent way of life with minimum intervention.

### **Duties and responsibilities of a volunteer bill payer**

- Visits the client at least monthly on a scheduled basis and at mutually convenient times.
- Performs bill payer tasks as agreed upon by both the client and the volunteer: Organizing financial records, creating a monthly budget, assisting with writing checks, balancing checkbook, etc.
- Adheres to program policy and guidelines
- Completes and submits monthly activity reports to program coordinator.
- Notifies the program coordinator, in a timely way, of any problems with assignments or planned absences from the program.

### **Qualifications of a volunteer bill payer**

- General knowledge of household budgeting and daily money management.
- Accuracy in maintaining financial records.
- Patience and tactfulness; ability to work cooperatively with a wide variety of individuals, including people with significant physical and mental impairments and varying socioeconomic backgrounds; ability to persist when dealing with government or community agencies.
- Able to provide own transportation to meet with clients.

### **Supports Provided**

- Initial orientation/training and periodic volunteer meetings.
- On-going support from program staff
- Volunteer supplemental insurance coverage
- AARP Foundation provides limited liability protection

### **Commitment of a volunteer bill payer**

- 4+ hours monthly
- One-year renewable commitment