



## **ROLE DESCRIPTION**

### **Later Life Planning Volunteer**

Responsible to:	Later Life Planning Manager
Time Commitment:	Minimum of 12 hours per week. 12-week training programme followed by Shadow shifts. Minimum 12-month commitment
Location:	Stratford House / Remote

### **About the Service**

Our team of dedicated staff and volunteers provide later life planning advice to help older people look after themselves and their loved ones. When it comes to making decisions about money and legal matters, our qualified team can help older people find peace of mind. We offer a wide range of services to help people in later life including writing and making changes to wills; giving advice on and drafting Lasting Power of Attorney agreements and Living Wills; helping find the right pre-paid funeral plan.

The service supports people over the age of 50 from across Birmingham and Sandwell.

### **About the Role**

In this volunteer role you will support older people either face to face or over the telephone, by collating information needed by the Later Life Planning team to prepare wills, Lasting Power of Attorney agreements and Living Wills. Specific tasks include:

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- Collating information through face-to-face, telephone or video call appointments with older people and their carers or family
- Providing guidance to clients on 'next steps' and timescales following collation of information
- Completing records of client contacts and liaising with key staff and volunteers at Age UK Birmingham and Sandwell
- Completing application forms
- Administrative duties including booking appointments
- To undertake Age UK Birmingham & Sandwell Induction Programme and additional relevant training where required
- To attend team meetings / supervision when required
- To adhere to Age UK Birmingham & Sandwell Policies
- To be an ambassador of the brand by adhering to Age UK Birmingham & Sandwell Volunteering Policy & Volunteer Code of Conduct

### **Personal qualities and skills most suited to this role**

- Good listening and communication skills essential
- Patience and tact
- Strong literacy and numeracy skills
- Good IT skills
- Excellent attention to detail
- The ability to understand written information and explain things
- A commitment to ensuring that customers are provided with accurate, relevant, and timely information and support
- The ability to write clear notes and records
- A caring, sympathetic, sensitive manner and a non-judgemental approach.
- Commitment to understanding the needs of people older people
- Reliable/dependable/flexible

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- Understanding of confidentiality (working with Age UK Birmingham and Age UK Sandwell's policies and procedures).

### Other Criteria

- Able to use own phone and computer to make calls during office closures
- DBS check