

ROLE DESCRIPTION

Later Life Planning Volunteer

Responsible to:	Later Life Planning Manager
Time Commitment:	Minimum of 4 hours per week / Minimum 12-month commitment
Location:	Stratford House

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; and helping find the right pre-paid funeral plan.

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 may include:

- To undertake Age UK Birmingham and Age UK Sandwell induction programme and additional relevant training where required
- To gather information through face-to-face, telephone or video call appointments with older people and their carers or family
- Provide guidance to clients on next steps and timescales following collation of information
- Undertaking research into funeral plans as required by the Later Life Planning Manager
- To attend team meetings/ supervision when required

Personal qualities and skills most suited to this role

- Good listening and communication skills essential
- Patience and tact
- Strong literacy and basic numeracy skills
- Basic IT skills



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

Other Criteria

- Full training is provided - a variety of both online and in person training.
- This role will also require an Enhanced Disclosure and Barring Service (DBS) check, which we will organise for you.

Time Commitment

The service will predominantly be delivered during office hours.

Contact

0121 437 0033

volunteering@ageukbirmingham.org.uk

Or download an application form

<https://www.ageuk.org.uk/birmingham/get-involved/volunteer>