

About Age UK Norfolk's Money Matters Service

Age UK Norfolk's money matters team help older people to manage their personal finances so they remain independent for as long as possible. The money matters role usually involves home visiting, however, during the Covid 19 pandemic, where possible, we are supporting older people remotely from home with contact by phone, video call, email and where necessary letter. We will still be able to home visit for urgent cases but this is optional for volunteers and a full risk assessment and PPE would be provided.

About the Volunteer Role

Main Purpose

- To help an older person to manage their finances. The older person may be in their own home or in a care home.

Tasks

- Volunteers will support the older person with tasks such as organising the payment of bills, setting up a bank account or direct debits, filling in forms, day to day financial management and helping to manage a budget. The financial tasks to be carried out will be agreed with the older person.
- Volunteering within the policies and practices of Age UK Norfolk

Skills

- Ability to process information from phone and video calls, emails and other documents
- Ability to write legible and accurate notes that record the actions taken
- Ability to assist clients with filling in forms and writing letters
- Ability to identify problems and suggest a number of solutions
- Commitment to equal opportunities and awareness of the discrimination that older people may face
- Good listening skills and the ability to explain complex information in a straightforward way
- Empathy with the problems faced by older people and their carers

Availability

Flexible but during office hours.

Responsible to and supported by

Advocacy Coordinator

Training

Full training and ongoing support is provided. This role is subject to a satisfactory DBS (criminal record) check.

Expenses

Expenses are reimbursed.

