

About Age UK Norfolk's Money M.O.T Service

Our Money M.O.T service is designed to support and empower individuals over 60, in managing their finances effectively. The service helps clients **Manage, Organise, and Thrive** financially, offering tailored support to build financial confidence and independence. Support is provided to each client, for a maximum of six months.

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About the Volunteer Role

Main Purpose

To help an older person manage and improve their financial wellbeing through structured support in budgeting, banking, benefits, and paperwork organisation.

Tasks

- Budgeting: Creating income and expenditure statements, identifying and reducing unnecessary outgoings (e.g. cancelling unwanted direct debits, reviewing utility spending).
- Debt Support: Referring unmanageable or regulated debts to appropriate debt management services and supporting any recommendations made.
- Benefits: Completing benefit checks and forms to maximise income and assisting with grant applications (including Disability Related Expenditure).
- Banking:
 - Setting up direct debits and standing orders for essential services.
 - Assisting with opening bank accounts.
 - Supporting access to banking services (apps, telephone banking, card issues).
 - Assisting in cases of financial fraud or scams.
- Paperwork organisation: Helping to organise and file paperwork, creating systems to support future independence.
- Signposting: Referring to other relevant services and organisations.
- House Sales: Providing support during the process of selling a home.

Skills

- Ability to process information from various sources (calls, emails, documents).
- Clear and accurate note-taking.
- Confidence in assisting with forms and correspondence.
- Problem-solving and solution-oriented thinking.
- Commitment to equal opportunities and understanding of challenges faced by older people.
- Strong listening and communication skills.
- Empathy and patience.

Availability

Flexible, but within the hours of 9am–5pm, Monday to Friday.

Responsible to and Supported by

Money M.O.T Coordinator

Training

Full training and ongoing support will be provided.

Additional Information

- This role is subject to a satisfactory Enhanced DBS (criminal record) check.
- Expenses will be reimbursed.

