



**money carer**

**Everyday money management**

For vulnerable people and their carers

- Celebrating our 15th year
- Confidential and GDPR compliant
- Promoting autonomy for clients

# Appointeeship services

**The Money Carer Foundation is an award-winning social enterprise and the UK's leading provider of independent Appointeeships.**

As a fully compliant and trusted partner of the DWP (Department of Work and Pensions) we work with over 110 Local Authorities, 200 law firms and 500 registered Care Providers, all of whom respect and rely on the expertise and experience we have acquired over the last 15 years.



This experience is called upon every day by Carers, Social Workers, Solicitors, Family members and, of course, by the many thousands of vulnerable people that we support, from all walks of life and from every part of the UK.

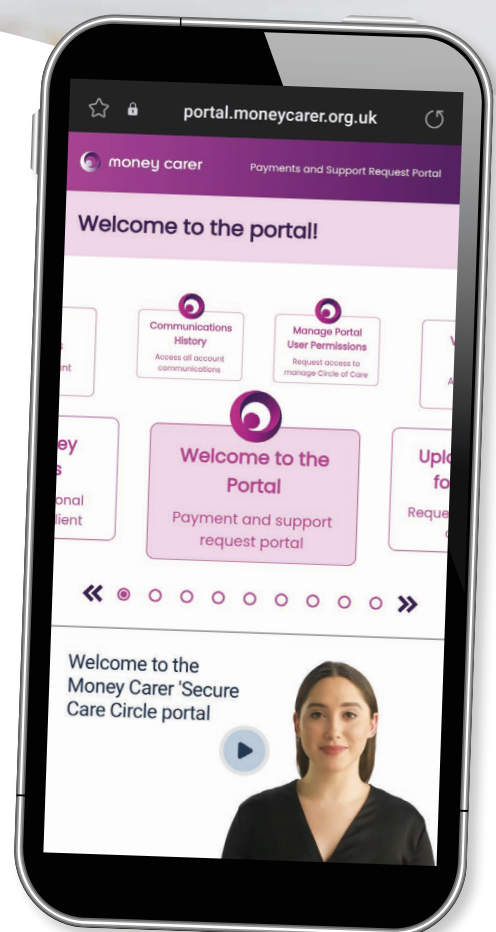
Our infrastructure is solid and robust; and our scale capabilities and resources are such that we are able to actively support the very many organisations currently struggling with much-documented social care resource limitations.



## The right choice

With innovations such as our Portal for messaging, money requests and information sharing ([portal.moneycarer.org.uk](https://portal.moneycarer.org.uk)) our Appointee Security Bonds Protection and our close collaboration with Kalgera, many Local Authorities, law firms and disability charities choose to use Money Carer's systems and technology as the best platforms to support their own clients, as Deputies, Attorneys or Appointees.

Our banking and payments platform is also linked to our smartphone App, which is used daily by thousands of diligent and dedicated Solicitors, Social Workers, Care Providers, loving Family members and, of course, by our many unique and brilliant individual clients.



# Our costs

Whilst our award-winning services are comprehensive and of the very highest quality, our costs are modest and affordable.

- **Clients who are community-based: £85 or £55 per month**
- **Clients who reside in Care or Nursing Homes: £55 per month**
- **Set-Up fee: £150 (refundable if all referral info received)**

\*Please note that most local authorities off-set our fees as Disability-Related Expenditure, where clients have been assessed to make a contribution towards their care.

Other associated costs in the delivery of our Appointeeship service, which are charged by our banking partners and passed on to our clients at cost, are:

- **The bank account administration cost is £55 per year**
- **Zero fees for ATM cash withdrawals**
- **Zero transaction fees either instore or online.**
- **Zero card replacement fees.**

Further information, along with a selection of 'How to' videos can be found on our website: [moneycarer.org.uk](https://moneycarer.org.uk)

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## For an extended list of dedicated, specialist services

Money Carer offers a unique blend of friendly, compliant, secure, confidential and diligent services to clients and their service providers. Together, these provide a supportive and person-centred approach, backed by the most innovative software technology in the business.

Our services include:

- Acting as Corporate Appointees, with full legal, GDPR and other compliance obligations
- Liaising with the Solicitors and handling communications with them where necessary
- Securely protecting clients' assets and information with FSCS fraud protection and enhance detection
- Liaising with Social Workers and handling communications with them
- Protecting clients through our trusted 'Circle of Care' access only (through the Money Carer 'Secure Portal')



- Enabling contact by online, App, telephone and email provision
- Helping Family members to be more involved through our 'Family Agreement' arrangements
- Working diligently and pro-actively to manage clients' finances and financial affairs in their 'best interests'
- Liaising with Care providers and handling communications with them
- Carrying out a Welfare Benefits (WB) review and ensuring that benefits are fully and correctly claimed
- Liaising with the DWP and handling communications with them
- Providing detailed 'debt management' guidance and implementation, where required
- The quick-opening of bank accounts with compliant, fully secure Banking partners
- Offering Online (Money Carer 'Secure Portal') or Money Carer App access
- Providing 'named' or 'sharer' Carer cards for support and case workers
- Payment of all household, utility bills and other client invoices
- Providing 'shared household' bill and other invoice solutions
- Providing personal monies and instant emergency payments where required
- Arranging savings and future budgeting plans
- Offering a unique 'sweep' system to keep bank balances at agreed levels
- Offering 'biometric fingerprint' cards to encourage and promote client autonomy
- Supporting clients to make a Will and / or a Funeral Plan
- Contacting 'deceased client' families and assisting with funeral affairs, where required
- Annual Reviews of all money management matters in-place

For more information please contact:

**T: 0800 083 0626**     **E: [refer@moneycarer.org.uk](mailto:refer@moneycarer.org.uk)**

The Money Carer Foundation, Dalton House,  
Cross St, Sale, Manchester, M33 7AR

