



Family Access Agreement/Disclaimer

The Money Carer Foundation (MCF) provides an Appointeeship service for UK vulnerable adults to provide money management and safeguarding protections.

As part of our legal role, we can, at our sole discretion, allow approved family members, access to our management systems to share certain elements of our client's financial information.

Only immediate family members will be granted access to form part of a Money Carer verified "Circle of Care" and the terms and conditions for this level of access are defined below.

Memorandum of Agreement

1: For access to be granted we will require a basic identity check to be completed by MCF to confirm and verify the identity of the family member requesting access to our client's financial information. This is completed online using MCF's account with [Experian](#). Please note, this is not a credit check and will have no effect on a person's credit file at all.

2: By MCF agreeing to grant limited access, the requesting family member acknowledges that this is solely at the discretion of MCF, and the organisation has no legal requirement to disclose our client's financial information to family members who do not hold a legal authority in relation to finances. Such as a Lasting Power of Attorney or Court of Protection Deputyship Order. This agreement is purely to provide transparency and clarity to trusted individuals.

3: The granting of access to certain elements of our financial information will be made purely on the basis that the information is provided online at portal.moneycarer.org.uk and/or by downloading the Money Carer smartphone app. MCF will not engage in telephone conversations with family members nor respond to requests for further information. The granting of access will be made purely to provide oversight and is not designed to be an open door for ongoing communications as resources have not been allocated for this discretionary service. MCF retain the right to withdraw access at any time if the terms of this Family Access Agreement/Disclaimer are not adhered to.

Please complete, sign and submit this document as part of your access request via the portal.

Name of MCF Client: - _____

Name of Family Member _____

Address of Family Member _____

Date of Birth of Family Member _____

A brief explanation of why you are requesting access to our client's financial information

A company member will assess the application and if approved, access will aim to be granted within 7 days. The verified family member will then be asked to create a Money Carer account by visiting portal.moneycarer.org.uk

Signed Agreement to these Terms & Conditions: (Family Member)

Signed:

Date: