

## Reasons older adults may need money management assistance

Older adults may...

- ◆ Have physical or mental disabilities
- ◆ Have bills not being paid
- ◆ Be unable to read or write
- ◆ Be overwhelmed or nervous
- ◆ Have lost their informal support or caregiver
- ◆ Be victims of financial exploitation or abuse
- ◆ Be dealing with serious illness
- ◆ Need budgeting assistance
- ◆ Be facing threat of eviction, loss of home, or foreclosure
- ◆ Have had or could have their utilities shut-off



### CRIS Healthy-Aging Center

201 West Springfield Avenue, Suite 501  
Champaign, IL 61820

**Phone**  
(217) 355-1543

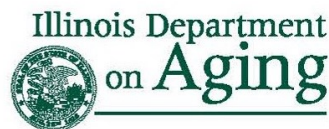
**E-mail**  
moneymanagement@agestrong.org

[www.agestrong.org](http://www.agestrong.org)



[www.facebook.com/CRISHealthyAgingCenter](https://www.facebook.com/CRISHealthyAgingCenter)

Program Assistance Provided by



## Seeking Volunteers to Promote Independence for Older Adults



## Volunteer Money Management Program

**CRIS Healthy-Aging Center**  
201 West Springfield Avenue,  
Suite 501  
Champaign, Illinois

**(217) 355-1543**

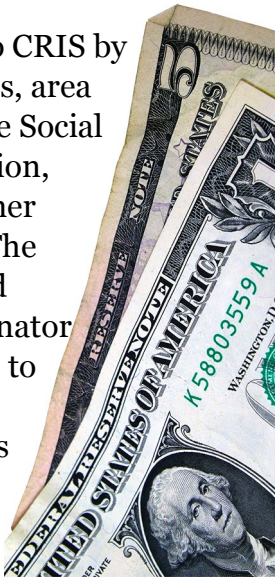
[www.agestrong.org](http://www.agestrong.org)  
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## The CRIS Healthy-Aging Center **MONEY MANAGEMENT PROGRAM**

is a free protective service for limited-income senior citizens who need help managing their finances. The goal of the program is to assist low-income older adults, as well as promote independent living and prevent unnecessary nursing home placement, guardianship, or homelessness.

CRIS is contracted by the Illinois Department on Aging to recruit, select, train, and match volunteers to assist senior citizens in managing their finances. Ongoing support and supervision is provided.

Referrals are made to CRIS by social service agencies, area agencies on aging, the Social Security Administration, family, friends, or other concerned persons. The trained volunteer and local program coordinator meet with each client to explain the program and assess the client's needs.



## Who is Eligible to Volunteer?\*

Someone who

- Enjoys spending time with older adults
- Wants to help reduce financial exploitation to senior citizens
- Is compassionate
- Is honest
- Is reliable
- Is patient
- Has strong ethical values

**If this is you, then call  
(217) 355-1543**

*\*A State Police background check is performed on all volunteers.*

## PROGRAM PARTICIPANTS SAY...

“When you trust someone, you don't have to worry.”

“My son is not calling me asking for money since he knows someone is helping. I feel safer financially.”

“Having this help has been a lifesaver— no more overdrafts at the bank or nasty creditors calling. Now I can finally start saving money.”

## What Does a Volunteer Money Manager Do?

**Bill payer** volunteers perform mail opening and organizing, budget set-up, checkbook balancing, and bill paying services to senior citizens who remain in control of their finances but need some help keeping things in order.

**Representative payee** volunteers are appointed by the Social Security Administration to manage monthly benefits of a client determined incapable of handling his or her own finances. A separate account is opened with checks automatically deposited. The representative payee manages and pays the client's expenses from this account.

## Program Safeguards

- Insurance coverage of client funds is provided.
- Volunteers are carefully selected and trained and provided ongoing support.
- Volunteers work from one designated account with a \$3,500 limit.
- Volunteer activity and accounts are monitored on a monthly basis.

**To become a volunteer, call  
CRIS Healthy-Aging Center at  
(217) 355-1543**