

Financial Care Management

A service of Lifespan

Trustworthy wrap-around financial care management at a reasonable cost.

From simple bill paying to compiling tax information and overseeing bank accounts, insurance matters, investments and more, Lifespan's Financial Care Management service ensures your financial well-being.

Financial Care Management is a service of choice for older adults and/or caregivers who would like trustworthy assistance overseeing finances.

Clients who choose Financial Care Management give Lifespan a specific role; to handle financial matters via power of attorney. A power of attorney is a legal document that allows you to appoint a person or an organization to act on your behalf.

In addition to daily financial management, Lifespan can coordinate:

- Vehicle sales.
- Burial plans.
- Home maintenance.
- House sales and content removal.
- Other personalized services as appropriate.

We do not take the place of a client's lawyer, broker, financial planner, accountant or social worker. We work with these professionals to facilitate their respective responsibilities.

FINANCIAL CARE MANAGEMENT:

Expert oversight you can trust. Peace of mind for you. Lifespan is bonded and insured.

Call us at 585-244-8400.

WHAT DO OTHER PROFESSIONALS SAY ABOUT OUR SERVICE?

"The staff is comprised of compassionate individuals who build rapport and trust. In short, they are skilled, responsive, diligent and competent."

— Robert Schultz, Esq.
Morgenstern, DeVoesick, PLLC

"When our residents need help with financial matters, and especially when we see red flags like overdue bills and other problems, I refer them to Lifespan's Financial Care Management service."

— Michelle Scipioni,
senior director of housing,
Episcopal SeniorLife
Communities

Financial Care Management

A service of Lifespan

Financial Care Management

Our service on your behalf includes:

- Getting to know your financial situation.
- Notifying places where you have accounts (utilities, banks, etc.) of our role on your behalf.
- Helping you obtain any governmental or other benefits.
- Handling mail.
- Paying bills and recording transactions.
- Reconciling your accounts.
- Depositing checks.
- Compiling tax information and arranging for tax preparation and filing.

OUR PROMISE TO YOU.

- You will always know your financial picture.

When you are ready to take advantage of Lifespan's Financial Care Management service, call us at **585-244-8400.**

We can get the process started at your convenience.

FINANCIAL CARE MANAGEMENT:

Expert oversight you can trust. Peace of mind for you. Lifespan is bonded and insured.

Call us at 585-244-8400.

Financial Care Management

A service of Lifespan

Financial Care Management Fee Schedule

Enrollment fee: There is a \$250 one-time charge.

Your **monthly maintenance fee** is based on your assets and includes full money management activities.

<u>Your Assets</u>	<u>Our Fee</u>	<u>Additional fees:</u>	
Under \$25,000	\$100	Filing a simple	
\$25,000 - \$299,999	\$200	Medicaid Application:	\$1,200
\$300,000 - \$599,999	\$300	Annual audit	\$100
\$600,000 - \$999,999	\$400		
\$1,000,000 plus	\$500		

Additional services are available and are charged at \$100/hour. These include:

- Reviewing insurance policies.
- Negotiating with creditors.
- Recertifying Medicaid.
- Recertifying housing.
- Compiling tax information.
- Selling vehicles.
- Identifying appropriate housing.
- Coordinating a housing move, household storage and transitions.
- Monitoring the safety of a property.
- Arranging for the sale of a house and property.
- Coordinating funeral arrangements.
- Coordinating the settlement of an estate.
- Working with Executor/Administrator/Public Administrator.
- Other special services as needed.

FINANCIAL CARE MANAGEMENT:

Expert oversight you can trust. Peace of mind for you. Lifespan is bonded and insured.

Call us at 585-244-8400.

www.lifespanrochester.org

1900 S. Clinton Avenue, Rochester, New York 14618

 LIFESPAN WELCOMES EVERYONE

Lifespan of Greater Rochester Inc. is regional nonprofit providing services for older adults in Monroe County and the Finger Lakes. Lifespan has been a trusted source of information, guidance and services for fifty years.