Household Financial Volunteer

Job Description

Purpose: This position assists older adult clients with managing budgets, bills and financial affairs. Clients must be engaged in the process and cognitively able to partner with the volunteer.

Duties: May include any or all listed below:

- Review, read and explain bills to client
- Make calls to vendors to make sure bills are accurate
- Assist in the writing of checks, if appropriate
- Assist in balancing bank statements
- Sort and read mail
- Gather and sort documents prior to meeting with tax accountant

Duties don't include:

- Preparing tax return
- Giving financial investment advice

Expectations: All volunteers are expected to stay within the boundaries of their job, maintain client confidentiality, and abide by the policies as stated in the Volunteer Handbook.

Time Required: Flexible scheduling, usually 1-2 times monthly arranged with client.

Requirements:
Never sign checks
Never give financial advice
Immediately report questionable expenses or concerns to the JFCS staff

Qualifications: Ability to relate to older adults. Ability to maintain confidentiality. Honesty in handling financial matters. Knowledge in basic banking procedures. Experience with writing and record keeping procedures

Training: An individual orientation is provided to all new volunteers

Benefits: Opportunity to utilize skills in bookkeeping and financial organization, and to learn more about services for the elderly.

Onboarding: Dana Shapiro, Community & Volunteer Engagement Manager, 952-417-2112 or dshapiro@jfcsmpls.org

Supervision: Senior Services Case Manager assigned to client.