

**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](mailto:dshapiro@jfcsmpls.org)

**Supervision:** Senior Services Case Manager assigned to client.