

# 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.

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### **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

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## Financial Care Management

Our service includes:

- Getting to know your financial situation.
- Notifying places where you have accounts (utilities, banks, etc.) of our role.
- 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.

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## Financial Care Management Fee Schedule

**Enrollment fee:** \$250 one-time charge.

**Monthly Maintenance Fee:** Based on resources.  
Includes full money management activities as below.

- Bill Paying
- Deposits
- Record Keeping
- Bank Reconciliation
- Client/Bank Communications
- Client Investment Committee Reviews
- Fraud & Identity Theft Protection
- Annual Account Audit

Monthly Rate	Resources
\$100	Under or equal to \$30,182
\$200	Above \$30,182

### Additional Client Specific Services Charged at \$150/hour:

- Annual Housing Recertification
  - Coordinate Housing Move, Storage, Transitions
  - Creditor Negotiations
  - Estate Coordination
  - Funeral Arrangements
  - Home Monitoring
  - House/Property Sale
  - Identify Appropriate Housing
  - Insurance Policies: Review and Assess
  - Setting up Accounts
  - Simple Medicaid Application/Annual Recertification
  - Storage Coordination
  - Special Services as Needed
  - Tax Compilation
  - Vehicle Sale
  - Work with Executor, Administrator, etc.
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