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.

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

Call us at 585-244-8400.
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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

<table>
<thead>
<tr>
<th>Monthly Rate</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100</td>
<td>Under or equal to $30,182</td>
</tr>
<tr>
<td>$200</td>
<td>Above $30,182</td>
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</tbody>
</table>

**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.