

# Penderels Trust Appointeeship Service

Penderels Trust offers advice, guidance and practical solutions to enable people with disabilities to live independently in their own homes, to achieve their goals in life and to help them play an active part in the community.

We are a not-for-profit organisation and have been a leading provider of advice and guidance to people with disabilities for over twenty years.

We are able to offer a comprehensive money management service for individuals that are unable to manage their financial affairs themselves. We are a Corporate Appointee authorised by the Department for Work and Pensions (DWP). This places our expert team of staff in an ideal position to support individuals with their money management, bill payment and budgeting needs. We have a friendly and professional approach, supporting a wide range of people including adults with learning disabilities, adults with mental health support needs and older people.

## Why choose Penderels Trust as an Appointee?

- We provide a person-centred, creative approach that enables individuals to continue living independently in the community.
- Our service ensures that funds are used only for the individual and in their best interests.
- Financial risk is minimised, giving local authorities, social care professionals, circles of support and advocates peace of mind for those to whom they have a duty of care.
- We help safeguard individuals who may be at risk of financial abuse.
- Our service ensures all individuals we support are receiving all the welfare benefits to which they are entitled.
- We work with local authorities to best meet desired outcomes for individuals.

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## Money Management

Wherever possible, it is best for an individual to retain responsibility for their own finances. The Money Management programme has been set up for those individuals who need some additional support to manage their personal finances. This is a six month programme during which a member of the Money Management team will support the individual with budgeting and managing their finances without taking overall control.

The emphasis is on empowering the individual to take responsibility for their finances and to give advice and guidance on how to budget for the future. The aim is also to prevent the need for an ongoing appointeeship service.

## Deputyships

Penderels Trust can offer support in partnership with our solicitors who provide a Deputyship service for individuals who no longer have the mental capacity to make their own decisions but do not have a Lasting Power of Attorney in place.

## Contact

**For further information on Appointeeships, Money Management or Deputyships, please contact:**

Penderels Trust,  
Resource House,  
1A Brandon Lane,  
Coventry,  
CV3 3GU

Tel: **02476 511 611**

Email: **enquiries@penderelstrust.org.uk**

Alternatively, more information can be found at **www.penderelstrust.org.uk**

If you would like this information in a different format, please contact our Head Office and we will do our best to meet your requirements.



Charity number 1073513  
Company number 3560335

# Service levels

We offer different options based on the level of support.

Community	Basic	Standard	Enhanced
Notify DWP and complete all paperwork	✓	✓	✓
Cover all legal requirements of appointeeship as stated by DWP (e.g. notifying changes in circumstances, including financial changes)	✓	✓	✓
Create and agree a budget to ensure ongoing obligations are met	✓	✓	✓
Ensure that all benefits are claimed at the correct time and rate	✓	✓	✓
Arrange payment of household utility bills, rent contributions, council tax and TV licence if applicable	✓	✓	✓
Receive and manage all social security benefits and tax credits	✓	✓	✓
Provide personal monies to the individual's agreed bank account if applicable	✓	✓	✓
Contact by telephone or e-mail as required	✓	✓	✓
Encourage individual to make a will and funeral plan	✓	✓	✓
Support with social worker reviews and safeguarding meetings if required	✓	✓	✓
Provision of pre-payment card*	✗	✓	✓
Payment of invoices for local services (e.g. gardener, cleaner, chiropodist)	✗	✓	✓
4 home visits per year if required	✗	✓	✓
Debt management (simple)	✗	✓	✓
Debt management (complex)	✗	✗	✓
Annual review of utilities	✗	✗	✓
12 home visits per year if required	✗	✗	✓
Assistance to transfer affairs to a solicitor (e.g. if selling house)	✗	✗	✓
<b>Cost</b>	<b>£800 per annum</b>	<b>£1,000 per annum</b>	<b>£1,300 per annum</b>
<b>All costs include our financial management package plus the following hours of support:</b>	<b>25 hours per annum</b>	<b>35 hours per annum</b>	<b>50 hours per annum</b>

Additional hours of support can be purchased.

\*Please see our pre-payment card information for conditions of use (multiple load ups per week may incur additional charge).

## Service levels continued...

Residential / Care Home	Basic	Enhanced
Notify DWP and complete all paperwork	✓	✓
Cover all legal requirements of appointeeship as stated by DWP (e.g. notifying changes in circumstances, including financial changes)	✓	✓
Create and agree a budget to ensure ongoing obligations are met	✓	✓
Ensure that all benefits are claimed at the correct time and rate	✓	✓
Residential or care home fees are paid	✓	✓
Encourage individual to make a will and funeral plan	✓	✓
Transfer funds to the residential home for the individual's use as and when required	✓	✓
Support with social worker review and safeguarding meetings if required	✓	✓
Debt management	✗	✓
Assistance to transfer affairs to a solicitor (e.g. if selling house)	✗	✓
Provision of pre-payment card*	✗	✓
<b>Cost</b>	<b>£400 per annum</b>	<b>£700 per annum</b>
<b>All costs include our financial management package plus the following hours of support:</b>	<b>10 hours per annum</b>	<b>20 hours per annum</b>

Additional hours of support can be purchased.

\*Please see our pre-payment card information for conditions of use (multiple load ups per week may incur additional charge).

Additional charges	
The packages include all DWP funding. Funding from other streams (e.g. private pension, savings account) will be charged as follows:	<b>£50 for one funding stream</b> <b>£100 for two or more funding streams.</b>
Set up and/or ongoing management of Motability Agreement	<b>£250/annum</b>
Funeral planning and arrangements	<b>£25/hour</b>
Additional hours of support	<b>£25/hour</b>

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“ Penderels Trust is a not-for-profit organisation offering advice, guidance and support to disabled people to enable them to live independently. We have been working with recipients of Direct Payments since their introduction in 1997 and are constantly developing and improving our services through working in partnership with people who use our services, local authorities and other organisations. ”