

Penderels Trust

Appointeeship Service



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Penderels Trust is a not-for-profit organisation and has been a leading provider of advice and guidance to people with disabilities and long term health conditions for over thirty 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.



Service levels required

We offer different options based on the level of support required.

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)	✗	✗	✓
Managing funding from other streams (e.g. private pension, savings account)	✗	✗	✓
Cost	£840 per annum	£1,060 per annum	£1,378 per annum
All costs include our financial management package plus the following hours of support:	25 hours per annum	35 hours per annum	50 hours per annum

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	✓	✓
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 reviews and safeguarding meetings if required	✓	✓
Debt management (simple)	✗	✓
Assistance to transfer affairs to a solicitor (e.g. if selling house)	✗	✓
Provision of pre-payment card*	✗	✓
Managing funding from other streams (e.g. private pension, savings account)	✗	✓
Cost	£424 per annum	£724 per annum
All costs include our financial management package plus the following hours of support:	10 hours per annum	20 hours per annum

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

Set up and/or ongoing management of Motability Agreement £265/annum

Additional hours of support including funeral planning and arrangements £30 per hour

Why choose Penderels Trust as an Appointee?

- We provide a person-centred, creative approach that enables individuals to continue living independently.
- 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.

Money Management Services

Wherever possible, it is best for an individual to retain responsibility for their own finances. We have a range of money management services for those individuals who need some additional support to manage their personal finances.

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.

Please see our Money Management Services leaflet for more details.

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

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.