

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	Low	Medium	High
Hours of support per year (up to)	32	42	55
Initial home visit (this may be virtual)	✓	✓	✓
Additional meetings	2	4	6
Welfare telephone call (six monthly)	✓	✓	✓
Notify DWP and complete all paperwork	✓	✓	✓
Cover all legal requirements of appointeeship as stated by DWP (e.g. notifying changes in circumstances)	✓	✓	✓
Create and agree 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	✓	✓	✓
Annual utilities review	✓	✓	✓
Six-monthly budget reviews	✓	✓	✓
Completing financial assessment forms and paying assessed care charges if required	✓	✓	✓
Encourage individual to make a will and funeral plan	✓	✓	✓
Transfer funds to personal bank account as and when required	✓	✓	✓
Payment of invoices	Up to 2 monthly	✓	✓
Support with social worker reviews and safeguarding meetings if required	✗	✓	✓
Assistance to transfer affairs to a solicitor	✗	✓	✓
Manage funding from other streams (e.g. private pensions, savings accounts) *	✗	✓	✓
Double up visits (two staff members)	✗	✗	✓
Online personal shopping orders	✗	✗	✓
Cost	£980 per annum	£1,270 per annum	£1,650 per annum

*This element is subject to the consent of the client who must have capacity.

Residential	Low	High
Hours of support per year (up to)	15	25
Initial home visit (this may be virtual)	✓	✓
Welfare telephone call (six monthly)	✓	✓
Notify DWP and complete all paperwork	✓	✓
Cover all legal requirements of appointeeship as stated by DWP (e.g. notifying changes in circumstances)	✓	✓
Create and agree 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	✓	✓
Annual budget review	✓	✓
Completing financial assessment forms and paying assessed care charges if required	✓	✓
Encourage individual to make a will and funeral plan	✓	✓
Transfer funds to residential home or personal bank account as and when required	✓	✓
Payment of invoices	Up to 2 monthly	✓
Support with social worker reviews and safeguarding meetings if required	✗	✓
Assistance to transfer affairs to a solicitor	✗	✓
Manage funding from other streams (e.g. private pensions, savings accounts) *	✗	✓
Online personal shopping orders	✗	✓
Cost	£450 per annum	£750 per annum

Additional Fees (all service levels for community and residential)	
Pre-payment card load (Basic = 1 load per week)	£150 per annum
Pre-payment card load (Enhanced = 2+ loads per week)	£400 per annum
Pre-payment card emergency load	£5 per load
Replacement card fee	£10 per card
Motability	£336 per annum
Close down fee - moving to another provider or no longer need the service	£175
Close down fee - death of client with a will and/or a next of kin	£175
Close down fee - death of client with no will and no next of kin	£225
Additional support hours	£35 per hour
Double up visit (if not included in package)	£150 per visit

*This element is subject to the consent of the client who must have capacity.

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

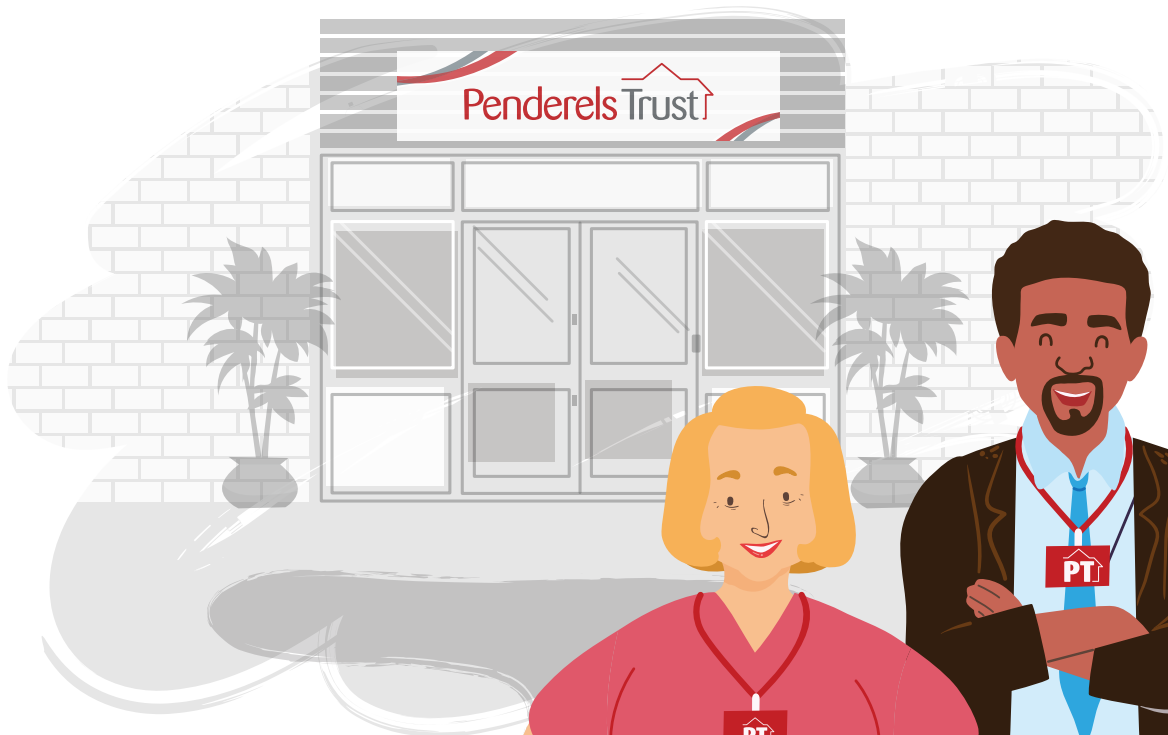
Wherever possible, it is best for an individual to retain responsibility for their own finances. We have a range of money management services for those individuals who need some additional support to manage their personal finances.

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

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Coventry,
CV3 3GU

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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.