

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 of Works 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-centered, 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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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	✓	✓	✓
Advise all household service providers (e.g. utility, telephone, TV) and make payment arrangements	✓	✓	✓
Receive and manage all social security benefits and tax credits	✓	✓	✓
Provide personal monies to the individual via direct debit to an agreed bank account if applicable	✓	✓	✓
Contact by telephone or e-mail as required	✓	✓	✓
Encourage individual to make a will (if appropriate)	✓	✓	✓
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	✗	✓	✓
Debt management (simple)	✗	✓	✓
Debt management (complex)	✗	✗	✓
Personal cash delivery to individual's house (monthly)*	✗	✗	✓
Annual review of utilities	✗	✗	✓
12 home visits per year if required	✗	✗	✓
Cost	£800 per annum	£1,000 per annum	£1,300 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

*More frequent cash drop offs are available at an 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 (if appropriate)	✓	✓
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)	✗	✓
Cost	£400 per annum	£700 per annum
All costs include our financial management package plus the following hours of support:	5 hours per annum	20 hours per annum



“ 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. ”

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Money Mentoring

Wherever possible, it is best for an individual to retain responsibility for their own finances. The 'Money Mentoring' programme (formerly pre-appointeeships) 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 Mentoring 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 aims 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 Mentoring or Deputyships, please contact:

Penderels Trust,
Seven Stars Estate,
Wheler Road,
Whitley,
Coventry CV3 4LB

Tel Local Rate: **0845 0500 862**

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.



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