



**BOSTON  
MONEY  
MANAGEMENT  
PROGRAM**

**BILL PAYER  
PROGRAM**



## **OVERVIEW**

Thank you for your referral to/interest in the Boston Money Management Program (BMMP)! We are looking forward to working with you to provide high quality volunteer Bill Payer services to maintain our clients' financial stability and security.

The BMMP affirms the missions of Ethos and our partners in the aging services field by facilitating payments of essential expenses for at-risk elderly and disabled clients to stabilize independent living within their communities.

The Bill Payer Program matches trained volunteers to guide and assist elders with their monthly bill paying and bank statement balancing.

## **Program Rules:**

- The volunteer acts as a guide for the client; the client has the right to make all decisions regarding their money
- The client must have a checking account when enrolled in the program and uses this account as their primary method of paying bills
- All regularly scheduled deposits (i.e. Social Security, pension, or other benefits) must be deposited into this designated checking account
- No more than \$3500 may be kept in this designated checking account at any time.
- The volunteer will help with bill paying only from the designated checking account.
- The volunteer is prohibited from serving in any other fiduciary capacity including, but not limited to, Power of Attorney, Trustee for property, or Conservator or Guardian
- Volunteers may not use a client's ATM or debit card
- Volunteers and BMMP staff are not responsible for any problems relating to a client's money or financial situation that a client has not disclosed
- BMMP staff and other BMMP volunteers have the right to review clients' bank statements, cancelled checks, and check register for audit purposes
- Volunteers are required to submit the client's monthly bank statements to the BMMP program staff

## **CLIENT-VOLUNTEER MATCHING PROCESS:**

- Referrals for services are made to BMMP and reviewed for suitability based on program guidelines

**CLIENT-VOLUNTEER MATCHING PROCESS CONTINUED:**

- New referrals may be matched with a Client Service Coordinator, who can provide monthly services until a long-term Bill Payer volunteer can be found
- Volunteer-client matches are made based on best fit. We seek to make long-lasting matches and consider factors such as location, compatibility, communication and environment
- A BMMP staff member will attend the client's first meeting with the prospective volunteer to facilitate introductions and explain program boundaries
- The Client Service Coordinator is available for ongoing support to both the client and the volunteer

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