C.A.S.H.
Creating Assets, Savings & Hope
An Empire Justice and United Way-led Coalition

Volunteer Role: C.A.S.H. Coordinator

Supervisor: C.A.S.H. Director

Work Site: Partner Site

Shift: 3 to 4 Hours per Week, by Appointment

Purpose of Volunteer Role: C.A.S.H. will have a regularly scheduled presence at a partner site for the purpose of providing one-on-one basic financial literacy skills training and services to income eligible clients and their families. This service will be offered as a variation on the C.A.S.H. Coach model and delivered by a volunteer **C.A.S.H. Coordinator.**

C.A.S.H. will train the volunteers. The partner site will provide appropriate space, IT equipment, misc. office supplies, appointment scheduling, and assistance with recruiting and managing volunteers. The client's need/interest in C.A.S.H. services will be determined as part of the partner site's intake process. If a client is interested and ready for C.A.S.H. services, an appointment will be scheduled with the C.A.S.H. Coordinator. The number of sessions with the C.A.S.H. Coordinator (or other C.A.S.H. representatives) will depend upon the service of interest.

Services Offered:

- Budgeting: C.A.S.H. Coordinator will work with client to identify the budgeting goal, sources of income and current expenses. (Examples of budgeting goals: expenses do not exceed income, save x dollars every month, reduce debt by y dollars every month, etc.) Minimum time required: one 2-hour meeting.

- Credit Report Review: C.A.S.H. Coordinator will help client download a free copy of his credit report. They will review it together to verify accuracy and identify any areas of concern. The Coordinator will identify what the client needs to do if there are reporting errors. The Coordinator might refer the client to credit counseling services. Minimum time required: one 1-hour meeting.

- Income Tax Return Preparation: C.A.S.H. Coordinator (or another C.A.S.H. Volunteer who is certified to prepare a tax return) will prepare federal and NYS tax returns for the current year and prior years as allowed. If possible, the returns will be e-filed (otherwise the client will be responsible for mailing returns to the IRS and NYS.) Minimum time required: one 1-hour meeting per tax year.

- Banking Services, i.e. Savings & Checking Accounts: C.A.S.H. Coordinator and client will discuss the options available and the benefits of each. The C.A.S.H. Coordinator will provide information for banks and credit unions who partner with the C.A.S.H. Coalition. If possible, the Coordinator will assist the client with application procedures. Minimum time required: one 1-hour meeting.

- C.A.S.H. Coach Evaluation: C.A.S.H. Coordinator will interview client to assess readiness for 6 to 9 month program of one-on-one coaching to learn and develop basic financial literacy skills, as well as realization of specific and measureable financial goals. If appropriate, the client will be matched with a coach. Minimum time required: one 1-hour interview followed by 6 to 9 months of one-on-one coaching.