

Supporting someone with their finances

What you need to know about legally supporting someone with their finances

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What are the options?


There are various ways you can legally support and manage someone's finances:

- A letter from the client confirming you can act on a person's behalf
- Power of Attorney
- Deputy appointed by the Court of Protection
- DWP (Department of Work and Pensions) appointee
- Buckinghamshire Council Finance Deputy Team

What is an Ordinary Power of Attorney?

An Ordinary Power of Attorney (OPA) allows a person to appoint someone to manage their finances and specific affairs for a limited length of time.

Please contact your solicitor or local Citizen Advice Bureau for further advice.

 **Address:** Citizen Advice Bureau
2 Pebble Lane
Aylesbury
Buckinghamshire
HP20 2JH

 **Go online:** www.aylesburycab.org.uk

 **Call:** 03444 111 444


What is a Lasting Power of Attorney?

A Lasting Power of Attorney (LPA) is a legal document that allows a person to appoint attorneys to act on their behalf and manage their affairs if they are unable to. An LPA must be registered with the Office of the Public Guardian before it is legally recognised.


The LPA **must** be set up, and can be cancelled at any time, while the person still has the mental capacity to choose who they would like to appoint.

There will be a cost involved.

To apply for an LPA you must get an application pack from the Office of the Public Guardian:

 **Address:** Office of the Public Guardian
PO Box 15118
Birmingham
B16 6GX

 **Go online:** www.publicguardian.gov.uk

 **Call:** 0300 456 0300
(Monday - Friday 9am - 5pm, except Wednesday 10am - 5pm)

The Court of Protection & Office of the Public Guardian

The Court of Protection decides whether a person lacks mental capacity and can appoint a suitable person to act as a deputy.

The Court of Protection may appoint you as a deputy to make decisions for someone when there is no Lasting Power of Attorney in place.

The Office of the Public Guardian is responsible for supervising and supporting the client during this process.

You can find more information and apply to become a deputy online at: www.gov.uk/become-deputy.

Department of Work and Pensions (DWP) appointee

You can be appointed as a DWP appointee if the person you want to help has low capital and their source of income is through a state pension or benefits.

Only one person can act as an appointee and this person will be responsible for making and maintaining all benefits and state pension claims.

For more information please visit: www.gov.uk/become-appointee-for-someone-claiming-benefits

Buckinghamshire Council Finance Deputy Team

This is a last resort service that is only accessible to existing Buckinghamshire Council adult social care clients who:

- have no one else willing and suitable to manage their finances
- have been assessed as lacking the mental capacity to do so themselves

Referrals and contact with the Finance Deputy Team are only made from existing Buckinghamshire Council social workers. If you feel this service may be required, please contact the person's allocated social worker.


Use this space to write down things you need to remember to tell us

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How to contact us


Adult Care Services

To get more information about adult social care services you can:


-  **Go online:** buckinghamshire.gov.uk and click on 'Care for Adults'
-  **Call:** 01296 383204

Are you worried about somebody?



If you or someone you know is at risk of abuse or neglect:

-  **Call:** 0800 137915 (24 hours a day)

If you would like to give us feedback

-  **Go online:** Please complete the online form at buckinghamshire.gov.uk

If you prefer you can:

-  **Call:** 01296 387844
-  **Email:** complimentsandcomplaints@buckinghamshire.gov.uk