

SOCIAL SECURITY REPRESENTATIVE PAYEE

What is a Representative Payee?

A Representative Payee is an organization that receives Social Security or Supplemental Security Income payments for a beneficiary who cannot manage his or her own money.

Among a range of duties, payees must:

- Use the beneficiary's Social Security or SSI payments to meet the clients essential needs, such as food, shelter, household bills and medical care. The money can also be used for personal needs like clothing and recreation.
- Keep any remaining money from benefit payments in a bank account or savings bonds for the beneficiary's future needs.



CONTACT US AT:

Central Wisconsin Community Action Council, Inc.

Guardianship Department

Attn: Jim Dahlke

P.O. Box 430

Wisconsin Dells WI 53965

PH: (608) 253-0944

FAX: (608) 254-4327

Services provided by CWCAC for qualified participants in Adams, Columbia, Dodge, Juneau, Sauk Counties:

Section 8 Housing Voucher Program
Emergency Housing Assistance
Crisis Assistance Program
Car Loan Program
Weatherization and Energy Assistance
Small Business Assistance
Emergency Food Pantries
Low Income Housing
Technical Assistance Program for New Businesses
Tuition Assistance Program for Education

CWCAC Central Office

1000 Hwy 13

P.O. Box 430

Wisconsin Dells, WI 53965

Ph: (608) 254-8353

Fax: (608) 254-4327

Email: info@cwcac.org

Our Local Community Action Agency Offices

Adams County
1874 Hwy 13
PO Box 647
Friendship, WI 53934
Ph: (608) 472-2687
Fax: (608) 339-9955

Columbia County
203 DeWitt St.
Portage, WI 53901
Ph: (608) 742-3320
Fax: (608) 742-0984

Dodge County
134 South Spring St.
Beaver Dam, WI 53916
Ph: (920) 885-9559
Fax: (920) 885-9589

Juneau County
534B La Crosse St.
PO Box 253
Mauston, WI 53948
Ph: (608) 847-1124
Fax: (608) 847-3009
Energy Assistance:
(608) 847-5988

Sauk County
505 Broadway
Job Center 2nd Floor
Baraboo, WI 53913
Ph: (608) 355-4812
Fax: (608) 355-4816



Central Wisconsin Community Action Council, Inc.



GUARDIANSHIP OF PERSON AND ESTATE

CONSERVATORSHIPS

TRUSTEE SERVICES

FEDERAL FIDUCIARY

Helping individuals manage their money to meet their needs and assure them a better quality of life.

Currently providing financial services to clients

in the following counties:

- ADAMS
- COLUMBIA
- DODGE
- JUNEAU
- MARQUETTE
- MONROE
- SAUK
- WAUSHARA
- WOOD

(May also available in other counties in Wisconsin)

GUARDIAN OF ESTATE

What is a Guardian of Estate?

A Guardian of the Estate is appointed by the Court and is responsible for financial management of the ward's assets and bill paying. The Court will require an annual accounting of the ward's assets.

Who needs a Guardian of Estate?

A Guardian of the Estate might be needed where there is no previously executed Durable Power of Attorney for Financial affairs or if an individual is mentally incapable of taking care of bill paying, investments and money matters.

GUARDIAN OF PERSON

What is a Guardian of Person?

A Guardian of the Person is appointed by the Court and has responsibility for overseeing the care and living situation of the ward, as well as medical decision-making.

The guardian's role is to assist the ward in making decisions about the support services the ward will receive, where the ward will reside, and medical treatment for the ward. If the ward is unable to make decisions, even with assistance, the guardian of the person has the authority to make decisions for the ward.

CONSERVATORSHIP

What is a Conservatorship?

Conservatorship is set up with the voluntary petition of the person seeking the financial assistance.

The conservatorship is a court supervised system under which the client voluntarily agrees to allow the agency to manage the client's estate.

After appointment, the conservator must file an initial inventory of all of the individual's assets with the court. The court will also require the conservator to file an annual accounting in which the income and expenditures are reported to the court. As a protective measure, the court may require the conservator to post a bond.

A conservatorship provides an individual with assistance in managing finances while retaining his or her rights.

Who needs a Conservator?

If you feel that managing your finances has become increasingly difficult or burdensome because of disability or other reasons, you may want to consider asking a court to appoint a conservator on your behalf to manage your finances.



FEDERAL FIDUCIARY



What is a Federal Fiduciary?

The Department of Veterans Affairs selects and appoints or recommends for appointment of a legal entity to receive benefits in a fiduciary capacity for a beneficiary.

Who needs a Federal Fiduciary?

The Veterans Service Center Manager is authorized to select and appoint, or in the case of a court-appointed fiduciary, to recommend for appointment a legal entity best suited to receive Department of Veterans Affairs benefits in a fiduciary capacity. This service benefits someone who is mentally ill, incompetent or legally disabled.

POWER OF ATTORNEY

What is a Durable Power of Attorney for Finances?

A Power of Attorney for Finances (POA) is a legal document that allows you to appoint a person or organization to manage all financial matters such as income and expense management including negotiating with creditors for reduced payments on your behalf.

Who needs a POA?

Anyone who feels in need of assistance to take care of their present financial situation and/or to plan for future financial decision-making in the event that they are unable to make their own decisions.