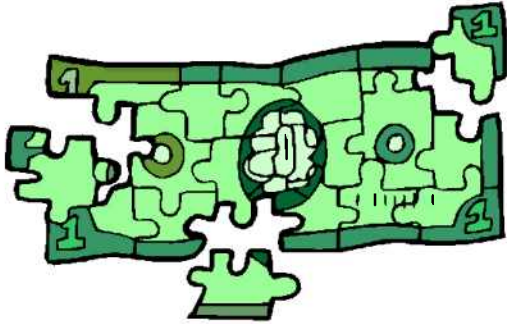


Please call us at
(608) 846-7058 to learn
more about what FA can
do for you.

A representative from FA
can meet with you and
discuss the details of the
program.



Helping you put together
the pieces of your financial
puzzle.

Carol Richards,
Executive Director
Kelly Kenyon,
Program Assistant



Fiscal Assistance, Inc. is
a not-for-profit agency.
FA administers the
payments for the
entire Dane County
(Wisconsin) Human
Services Self-
Determined-Support
(SDS) program.

FA was formed in
July 2000 to
administer SDS
payments.

**Fiscal Assistance
of Dane County, Inc.**

124 West Holum
DeForest, WI 53532

Phone: 608-846-7058

Fax: 608-846-3412

Email:

CarolR@fiscalassistance.org

www.fiscalassistance.org

Let us help you
manage your
money.

**Fiscal Assistance
of Dane County, Inc.**



**Representative
Payee
Program**

**Telephone:
608-846-7058**

Helping you manage your money...



Social Security's Representative Payee program provides a way for recipients to manage their benefits, even if they personally cannot.

Typically, close friends or family members fill this role. Sometimes, though, friends and family are not able to do this for you.

This is where FA can help. Fiscal Assistance can serve as your representative payee to manage your benefits for you.



Advantages of having Fiscal Assistance as your Representative Payee:

- FA has an established line of communication with your local Social Security office.
- FA can represent you in meetings with utility companies to ensure that you are receiving all the aid for which you qualify.
- FA tracks account balances for SSI beneficiaries to ensure that the balance does not exceed the \$2,000 limit. FA recommends acceptable personal needs expenses to maintain your balance below \$2,000.
- FA provides written contracts, outlining the terms of our relationship and the monthly cost of our services. (Clients are billed a nominal monthly amount, as determined by the Social Security Admin.)
- FA is audited annually by an independent CPA firm to ensure compliance with generally accepted accounting procedures.
- FA maintains a \$1 million fidelity bond for client protection.
- FA may be able to assist with tax returns, depending on your circumstances.

What happens with your funds when you have FA as your rep payee?

- Your Social Security monthly benefits are directly deposited into an account for FA's rep payee clients.
- Your monthly bills are mailed directly to Fiscal Assistance. FA sends payments for rep payee bills out weekly. You have peace of mind, knowing that your bills are paid on
- You receive a regular spending allowance based on your needs and budget.
- You receive a statement at the end of each month showing the amount of your monthly benefit received, which bills were paid, how much was paid, and what your current account balance is.
- FA completes all reports required by the Social Security Administration to account for how your funds were spent.