



## **Creating a Budget for a New Representative Payee Client**

Please use a separate **“Request for Funds”** sheet for each item on the budget and fill the form out completely.

**PLAN of PA** fee - Deduct our monthly fee. Currently, the fee is \$37.00 per month.

**Rent** – Clearly state to whom to make the check payable and where to mail.

**Personal Expenses** - The client’s personal expenses can be sent out monthly, twice a month, or weekly. Expenses are paid by check unless the client needs to receive a money order. (There is an extra USPS fee of \$1.10 charged for each money order.) If the client decides to have his personal expenses paid out weekly, please compute all months as five-week months. The extra money will accumulate as savings in the account and can be requested by filling out a “Request for Funds” form whenever needed.

**Ongoing Bills** – For bills that are the same amount each month (e.g. paying off a fine or an outstanding bill at a set amount each month), you may wish to fill out one Request for Funds form, fill in the amount you wish to pay each month, send us a copy of the bill if possible and make sure we have a total amount due so we can calculate when the bill is paid off.

**Telephone, cable, gas, electric, and similar bills** – Monthly bills that vary in amount should be sent directly to us. Please complete a change of address. **The client’s name needs to remain on all billing statements.**

**Please change the address as follows:**

**Client’s Name**  
**c/o PLAN of PA**  
**P. O. Box 154**  
**Wayne, PA 19087.**

For the first month, please send us the whole bill if a change of address has not yet been done.