**MABVI FINANCIAL TRANSACTION RELEASE FORM**

The Executive Office of Elder Affairs has issued the following requirements with respect to direct service workers (DSWs) and volunteers and money handling.

**I understand as a MABVI Volunteer I:**

* May NOT reconcile or balance a consumer checkbook
* May NOT cash checks for a consumer without the consumer present
* May NOT use a consumer’s Bank Cards or ATM (Automated Teller Machine) for any purchase other than for the agreed upon purchase
* May not use an ATM without a consumer present
* Will NOT provide other banking services.

If there are any questions regarding these policies, and or any concerns that might occur later, please contact Alexandra Maggio, Director of Volunteer Engagement and Retention at [amaggio@mabcommunity.org](mailto:amaggio@mabcommunity.org) or call 617-972-9119. The purpose of this form is to protect consumers from any type of financial harm or exploitation, and must be signed by the volunteer prior to any shopping services with the consumer.

By my signature, I understand and agree to these procedures for financial transactions.

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| Signature of Volunteer |  | Date |