

## **Pro Bono Volunteer – Cancer Program**

[Link to You Tube Video "Why Pro Bono for Cancer" 2:51min](#)

How to become certified to participate in the Pro Bono Program

- [Link to FPA Basic Pro Bono Training](#) or [Link to Pro Bono Boot Camp via Kaplan Financial for NON FPA Members](#)
- [Link to Pro Bono Cancer training](#)

What would be your role?

As a pro bono financial planner, you will advise and/or prepare a brief financial plan for each cancer patient and/or their caregiver. This process may entail:

- Creating and/or examining budget and balance sheets
- Organizing their finances, tracking and reducing expenses, and managing debts
- Troubleshooting and anticipating financial challenges
- Contemplating credit decisions and new uses of assets
- Examining life, long-term care or disability insurance questions

What is your expected commitment?

- Work with approximately three clients per year
- Reach out to the client within 2 days of referral.
- Engage with each client up to three - four times, including for example, one meeting for introductions and data gathering, one meeting for planning, and one meeting for checking in with the client. Engagements can be done in-person, by phone or by Skype/FaceTime.
- Spend a total of up to 2 to 6 hours with each client, depending on the client's needs.
- Submit a summary after first two meetings and then when finished with a family  
(Working with research team to learn what information they need from Pro Bono Volunteers)

## **How the program works**

Sign a Letter of Agreement with FPA and Carolinas Healthcare Foundation

Carolinas Healthcare Foundation – Leukemia Clinic at Atrium Health's Levine Cancer Institute

The Leukemia Clinic will evaluate the need of a CFP. Prior to assigning a CFP, they will share the following for the clients to review:

- Family Reach Financial Handbook [Link to Family Reach Financial Handbook](#)
- Orientation Video
- Any other videos created

Accept / Decline Client

You will receive an email asking you to work with a client.

1. Within 2 days, please accept or decline the request.
2. Within 2 days of acceptance, send an initial email to client

Initial email to client

1. Introduce yourself
2. Discuss next steps
3. Attach Spending, Assets and Debt Management worksheets. [Link to Tool Kit](#)
4. Ask them to complete the worksheet to the best of their ability prior to your first meeting.
5. Attach Engagement Letter – let them know you will both need to sign this at the meeting for you to be able to work with them.

### First Meeting

- Allow them to share their story.
  - Validate their challenges
  - Normalize their situation
  - Ask what they understand about the treatment plan
- Review and sign the engagement letter.
- Let them know you can provide the tools to help them
  - Understand their full financial picture
  - Manage their cash flow
  - Pay their bills
- Review the worksheet you sent to them. If necessary help client understand how to complete the worksheets.
- Talk through ways they can reduce / eliminate non-essential spending and prioritize debt.
- Provide guidance on how to address other issues and short term goals.
- Send follow up email with summary of meeting and next steps. Remember, these individuals may be in distress and need help remembering what was discussed. A summary and next steps will help them.

### Additional Meeting

- We ask that you follow up with your clients three times for about 30 minutes each time.
- Please schedule these follow up calls based on the timing of assistance needed. For example, the 1<sup>st</sup> follow up call may be closer to your initial meeting. Other meetings may be 3-4 months after prior meeting to check in and see if the tools were helpful and if they have additional questions.

### At all times

- Don't be afraid to say you don't know the answer.
- Do not sell a product or promote your business.
- Reach out to FPA if you need a specialist to refer to. (Estate Planning, Insurance, Credit Counseling...)

### Resources

- Team at Levine Cancer Institute
- Family Reach Tool Kit [Link to Tool Kit](#)
- Trainings
  - [Link to FPA Basic Pro Bono Training](#)
  - [Link to FPA Pro Bono Boot Camp via Kaplan Financial](#)
  - [Link to Pro Bono Cancer training](#)
- [FFP Consumer Resources](#)