



# Financial Navigators



Cities for  
**FINANCIAL  
EMPOWERMENT**  
Fund



OFFICE OF COMMUNITY &  
ECONOMIC DEVELOPMENT

*Collaborative solutions for a promising future*



United Way  
of Washtenaw County

# COVID-19 is leaving residents economically insecure

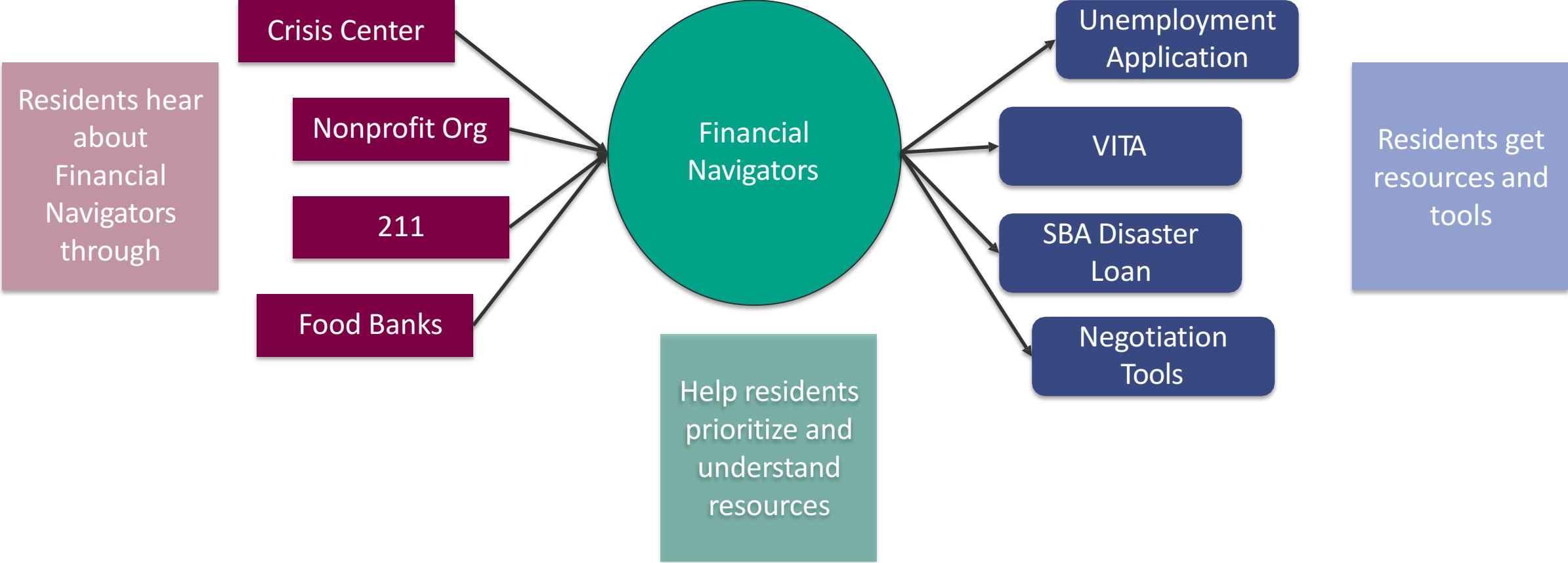
Workers in various sectors across the country are being laid off or experiencing reduced hours, are getting sick, or are serving as caretakers for family members in need.

- Many are unsure whether and which resources to seek
- Overwhelmed by multiple sources of info
  - Media, Friends and Family, Scams, etc.
- Confusion around eligibility and prioritization

# The Solution: Financial Navigators

- A place to start
- Unbiased/centralized advice
- Hub for resources and referrals
- Built into your local government's COVID response programming
- Trained to triage and prioritize financial concerns

# Financial Navigators help triage people with questions to good sources of support



# Financial Navigators help residents manage expenses & maximize income



## Managing expenses:

- Prioritizing payments
- Guiding on negotiations with creditors to pause payments without accruing interest including credit card companies, student loan servicers, personal and business lenders
- Determining if utilities payments can be paused without disruption of service
- Considering options to leverage insurance

## Maximizing income:

- Enter Barrier Buster requests
- Ensuring receipt of federal payments including Families First Coronavirus Response Act
- Guiding on enrollment of unemployment insurance, food security benefits, and other available resources
- Connecting to Volunteer Income Tax Assistance sites to apply for tax refunds



# 30-minute calls to triage financial guidance based on client's concern & assessment

Client contacts Financial Navigators to get into queue

Client discusses financial concerns with Financial Navigator

Navigator is scripted to triage priorities

Navigator sends follow-up to client with recap of guidance

# How to access Financial Navigation



## Financial Navigators

Complete the form below to request a phone session with a Financial Navigator that can help you navigate critical financial issues and make referrals to other social services and necessary resources.

A Financial Navigator will call you in three business days.

### Client Information

Tell us about the person interested in a phone session with a Financial Navigator.

* First Name	* Last Name
<input type="text"/>	<input type="text"/>
Home Phone	* Mobile Phone
<input type="text"/>	<input type="text"/>
* Preferred Phone <input type="radio"/> Home <input checked="" type="radio"/> Mobile	Email <input type="text"/>
* ZIP Code	* Preferred Language English
* Do you consent to receive communication from Financial Navigators? Select an Option	If you consent to communication, which method would you prefer? <input type="radio"/> SMS/Text <input type="radio"/> Email

Submit

- Visit <http://uwgive.org/financialnavigation> and complete the interest form.
- Call 734-677-7202

# Any Questions?

Submit questions using the Q&A box on the bottom of the screen.