

Financial Services

Community Action Agency

784-4800

1214 Greenwood Ave. (McHugh Center)

Jackson, MI 49203

Service: **Financial Stability** classes teach money management skills, how to establish and maintain good credit, and other financial topics in 5 week sessions.

Eligibility: any interested adult, no age or residency restrictions.

Fee: free

Green Path Debt Solutions

1-888-776-6735

(Consumer Credit Counseling Center, HUD approved)

2055 Spring Arbor Rd.

Jackson, MI 49203

Service: Financial counseling and education service for those in debt. Certified counselors analyze financial situation and prepare a budget and action plan. A debt management plan may be recommended. The debt management service advocates with creditors and negotiates payment plans. Bankruptcy counseling and reverse mortgage counseling services offered.

Additional information at www.greenpath.org.

Eligibility: Phone pre-screen needed. Local appointments set up if eligible.

Fee: Most counseling sessions are free of charge. Reverse mortgage counseling \$199. Debt management and bankruptcy programs have fee based on sliding scale, maximum fee \$50/month.

Elder Law of Michigan, INC

1-866-400-9164

Pension Counseling

3815 W. St. Joseph, Suite C-200

Lansing, MI 48917

Service: Provides free legal counsel to those with concerns about pension benefits. Can assist those with pensions from Michigan companies, as well as companies from Indiana or Tennessee, and perhaps other states.

Hours: 8 AM - 5 PM

continued

Social Security Administration

234 W. Louis Glick Hwy, Suite 200
Jackson, MI 49201

local: 1-877-405-0473

national: 1-800-772-1213

Service: provides information about Social Security retirement, disability, survivors and Medicare benefits, and Supplemental Security Income benefits. May use website to apply for many benefits: www.ssa.gov

Hours: 9AM – 4 PM Monday- Friday.

9 AM – 3 PM Drop box available Monday, Wednesday and Friday

Tax Preparation:

Volunteer Income Tax Assistance Preparation (VITA)

Community Action Agency

247-2099

Service: trained, IRS certified volunteers prepare and file Federal, State and City tax returns. Also complete tax credit forms such as Home Heating Credit and Homestead Property Tax Credit forms.

Eligibility: household income less than \$57,000

Fee: no charge

Locations vary.

Willis Trust Care Corp

788-8660

Willis and Jurasek
4100 Spring Arbor Rd.
Jackson, MI 49201

Service: provides private financial services, such as gathers info on all assets, monthly bill paying, prepares taxes, offers investment services as needed, and reports quarterly to individual or family. Can prepare payroll and tax filing for household caregivers and independent contractors providing care in the home. Able to act as Power of Attorney for finances or conservator. (Conservator appointed by Probate judge.)

Fee: billed by hour. Call for rates.

See “Emergency Services” section for financial crisis or call 211.