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10 Mayflower Street, Duxbury MA, 02332 781-934-5774 x 5700

**FINANCIAL TRANSACTION RELEASE FORM**

The Executive Office of Elder Affairs has issued the following requirements with respect to direct service workers (DSWs) and money handling. DSWs are necessary for grocery and pharmacy shopping.

**A Senior Center Staff Member (serving as a DSW) who provides shopping for me must follow these procedures:**

* A DSW must provide me with a written receipt for any transaction.
* A DSW may use EBT card (Electronic Benefit Transfer).
* In respects to grocery shopping, a DSW may use a check pre-written by me, written out with the name of the specific grocery store and pre-signed by me. The amount that the DSW writes in the store, must agree with the receipt.

**I understand that my DSW:**

* May NOT reconcile or balance my checkbook
* May NOT cash checks for me.
* May NOT use my Bank Cards or ATM (Automated Teller Machine).
* May NOT provide other banking services.

If there are any questions regarding these policies, and or any concerns that might occur later, please contact Joanne Moore, Director at the Duxbury Senior Center at 781-934-5774 x 5700 or joannemoore@duxburycoa.com. The purpose of this form is to protect consumers from any type of financial harm or exploitation, and must be signed by the consumer for the Duxbury Senior Center to authorize any shopping services.

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

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| Signature of Consumer |  | Date |