

# Best Payments Payee Services



When someone is unsure or unable to manage their money,

**Best Payments is here!**

Often times, there is a lack of basic financial knowledge about paying bills and budgeting due to a physical, mental or developmental disability.

By collaborating with The Social Security Administration,

**Best Payments Payee Services** provides a safety net for you and your loved one.

## Why Choose Best Payments?

- **We Have Experience**  
Our staff has over 24 years of bill payment processing expertise.
- **We Understand**  
Our company was founded by the parents of a special needs child.
- **Our Promise**  
We will answer or return your calls and emails within 24 hours.
- **We've Been There**  
Our staff has personal experience with incompetent payee services.
- **Our Guarantee**  
If a bill is not paid on time, Best Payments will pay the late fee.
- **Our Reporting**  
We provide monthly reporting on income, expenses and savings.



Call 740-263-7970 or visit our website for pricing and additional information.



## Best Payment Services

**We treat everyone as an individual.**

We work with the team to provide options to best serve the needs and abilities of each client.

**We offer options.**

Options include, how often to receive discretionary spending money; weekly, bi-monthly or monthly

We also offer options on how to receive discretionary spending money; by a paper check or a reloadable prepaid card.

Please see our website for information on the prepaid cards.

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# Best Payments

## Payee Services



### New Client Instructions & Checklist

We are pleased you have selected Best Payments for your Payee Services. In an effort to make the transition as smooth as possible, we have created this instruction & checklist sheet. This form will explain what is required and what you can be expected after you turn in the application.

#### New Client Intake Forms

- New Client Application (2 pages)
- Authorization for Payee Services
- Client Bill of Rights & Responsibilities
- Form SSA-4164 Advanced Notification of Representative Payment

#### Documentation

- Guardianship Agreement / Paperwork (required)
- Copy of Health Insurance Card / Medicaid Card (required)
- Picture ID (required)
- Copy of Birth Certificate (if possible)
- Copy of Social Security Card (if possible)

Please submit the completed, signed forms and the requested documentation to our office; you can fax, email or mail the information. We will process the application within 2 business days. We will also call within 15 days to set up meeting to create a budget. This meeting can be face to face or over the phone, whichever is more convenient for you or your client.

Once your application has been processed and approved by Social Security, we will mail a welcome pack to you. The welcome pack contains helpful hints for working with a payee service, forms you may need in the future and a copy of the budget.

Please contact us with any questions you have. We look forward to serving your Payee Services.

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