HELPING YOU ACHIEVE FINANCIAL SECURITY IS AT THE HEART OF ALL WE DO.
DISCUSSION OUTLINE

Brief Introduction
Who is RDI?
Core Values
Programs and Services at RDI
People Behind the Mission
How to Contact Us
WHO IS RDI?

- Non-profit 501c3 est. April 19, 1968
- 7 staff members, 2 AmeriCorps volunteers, and 6 community board members.
- In 2019, we served 7,566 clients.
- RDI provides all services and programs state-wide in MT.
- Our unique populations are the elderly, persons with a disability, veterans, low to moderate income households, and Native American communities.
TEAMWORK
We all need each other to accomplish our goals. Respect, creativity, and collaboration are the foundations of our relationships with our colleagues, clients, and partners.

QUALITY
We invest in innovation, learning, and training. We insist that our services and our contribution to partnerships and communities create true value, steward resources, and make a real difference in people’s lives.

INTEGRITY
We take our role in supporting people through vulnerable times and empowering them to pursue economic opportunities, very seriously. We seek to be worthy of people’s trust. We treat others with respect.
Organizational Representative Payee
Montana Families Trust, Self-Settled Trust
Montana Assistive Technology Loan (MATL)
Financial Coaching and Education
Tax Help Montana
AmeriCorps VISTA Intermediary
ORGANIZATIONAL REPRESENTATIVE PAYEE

SAFEGUARD YOUR FINANCIAL WELLBEING WITHOUT COMPROMISING YOUR INDEPENDENCE
PUT YOUR TRUST IN US

RDI is the organizational Trustee of the Montana Families Trust, an irrevocable special needs pooled trust created to enhance the quality of life for Montana residents with disabilities.

D.A. DAVIDSON

With D.A. Davidson, we administer these first and third party trust accounts for beneficiaries with special needs.

PREFERRED PROVIDER

Our services have been approved by DPHHS and the Social Security Administration.
## Montana Assistive Technology Loan (MATL)

If you are a person with a disability or are the caregiver for someone who is, then you understand how important assistive technology can be for the overall quality of life.

<table>
<thead>
<tr>
<th>INTEREST</th>
<th>REQUIREMENTS</th>
<th>INCOME</th>
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<tbody>
<tr>
<td>0% interest up to $1,500. 3.5% interest on $1,501 or greater.</td>
<td>MATL can assist Montanans of all ages, disabilities, and health conditions.</td>
<td>Individuals of all income levels may apply for a loan.</td>
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FINANCIAL COACHING AND EDUCATION

BASED ON A PROSPERITY NOW SURVEY

42% OF U.S. HOUSEHOLDS HAVE NOT SAVED FOR AN EMERGENCY.
Tax Help Montana (THM) is a Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) program that provides free individual income tax preparation for low- to- moderate income and elderly individuals and families across Montana and Idaho.

**TAX HELP MONTANA**

**BY THE NUMBERS**

- Ongoing 16 years and counting!
- 33 partner sites throughout the state.
- 129 volunteers active during tax season.
- $12.8 million dollars kept in Montanan hands through free returns.
AMERICORPS VISTA INTERMEDIARY

Volunteers In Service To America are placed from all over the country to MT projects.

Focus areas of projects include financial literacy, workforce development, affordable housing, food security, veteran services, homelessness, equity, and Native American initiatives.

MT ECONOMIC OPPORTUNITY BY THE NUMBERS

- Ongoing 7 years and counting!
- 22 Host Site Partners
- 13 Active Members
- Monthly Recruiting - 5 projects currently
- 12 MT cities served
GET INVOLVED

Become a referral champion.

Volunteer with Tax Help MT (THM).

Become a Host Site for AmeriCorps VISTA or THM.

Apply to become a Board or Loan Committee Member.

Give an individual donation.

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