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| **A picture containing text, clipart  Description automatically generatedFAMILY ELDERCARE****Estates Specialist****Job Description** |
| Job title: Estates Specialist | Reports to: Guardianship Estates Manager |
| Program: Guardianship  | Work Location: Rutherford Office |
| Position Status - Full-timeFLSA Classification - Non-Exempt | Salary Range - $24.00/hour |
| The Estates Specialist is responsible for protecting, maintaining, and disposing of client assets per individual Court Orders under direction of Manager.**Essential Duties and Responsibilities:*** Assist with initial inventory and marshalling of assets, change of address
* Travel to homes, storage centers, and other locations to organize and secure assets and client property under direction of Estates Manager
* Change locks on any real property owned by the client
* Secure any vehicles owned by the client, obtain title, determine whether to sell vehicle.
* Check Unclaimed Property for any Unclaimed funds of the client.
* Property maintenance of client real assets per court order (liquidate, preserve, hiring 3rd party, etc.)
* Collaborate with Guardianship team and Legal in the management of assets according to the Texas Estates Code
* Communication to banks/financial institutions providing initial and annual LOG, closing accounts as needed
* Administrative tasks
	+ Bank reconciliations,
	+ Gathering & Scanning tax documents
	+ Filing financial documents
	+ Collating backup to Bank Statements and filing
	+ Purging and Archiving Financial Documents
	+ Banking – Deposits
	+ Post office run
	+ Assist with Mail Distribution
* Other duties as assigned
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| **Education and/or Work Experience Requirements:*** High School Graduate: Associates preferred
* QuickBooks Online Preferred
* Experience with property management and banking desired
* Proficient in Microsoft Office products
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| **Working Conditions/Physical Requirements:*** Work duties occur both in an office setting and off site, real property, storage facilities, financial institutions, conducting duties related to guardianship Estates services
* A significant amount of time is spent on the computer
* May occasionally involve physical tasks, in
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| **Competencies:*** Ability to advocate for client’s best financial interest, manage real property assets judiciously and in compliance with Texas Estates Code
* Ability to work independently, organize work efficiently, prioritize response to changing needs of the program with moderate supervision
* Ability to keep accurate and organized records
* Ability to interact in a positive manner in person and on the phone
* Ability to articulate clearly in both verbal and written communications
* Ability to make constructive use of professional supervision
* Ability to learn and demonstrate knowledge of involved Court systems
* Ability to learn about Medicare and Medicaid, SSA, SSDI, SSI, VA, and related Representative Payee programs
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| **Acknowledgement and Review:**By signing this job description, I acknowledge that I meet the qualifications, and am able to perform all job functions, duties, and responsibilities [ ]  with or [ ]  without reasonable accommodations. I further understand that I am responsible for promptly and effectively communicating in writing to the Company any need for accommodation. I acknowledge that I have read, understand, and may receive a copy of this Job Description. I further understand that Family Eldercare reserves the right to modify any Company policies, procedures, and processes based on organizational needs.  |
| Print Employee Name: |
|  Employee signature: Date: |