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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-time  FLSA 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 | |
| **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 | |
| **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 | |
| **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 | |
| **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: | |