

**FAMILY ELDERCARE**  
**Guardianship Estates Manager**  
**Job Description**



Program: Guardianship	Reports to: Director of Guardianship
Job Location: Rutherford Office	Position Status: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time
FLSA Classification: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-exempt	Salary Range: \$61,505.60 - \$71,510.40

The Guardianship Estates Manager is responsible for managing court-monitored guardianship and trust estates.

**Essential Responsibilities:**

**Asset Management/Accounting:**

- Oversee and monitor all activities associated with managing the estate accounts including: cash management, marshalling of assets, asset valuations, ascertaining and paying creditor claims, developing plans of distribution, and asset planning in support of the best interests of the guardianship ward/trust beneficiary
- Manage and/or liquidate assets, including stocks, bonds, CD's, pensions, annuities, insurance policies, with support of Program Attorney.
- Oversee and coordinate management of personal property, commercial and residential real estate, farm and ranch properties, timberland, oil and gas interests.
- As needed, consult with outside financial advisors to support proper management of investment accounts
- Communicate and consult with attorneys, accountants and others for asset and risk management
- Partner with Program Attorneys to meet court deadlines.
- Reconcile client bank accounts.
- Approve client expenditures based on account balance and needs.
- Coordinate and consult with CPA for timely filing of income taxes

**Supervision:**

- Supervise and lead team to ensure compliance, efficiency and quality administration of accounts
- Exercise financial oversight and ensure proper financial controls are in place
- Suggest improvements and enhancements to better ensure quality service
- Manage risk by effectively completing internal compliance and administrative duties such as cash management, file documentation, workflows and regulatory reviews
- Interview, select, and hire new staff for team vacancies.
- Prepare and conduct improvement plans, introductory, and annual performance evaluations.
- Provide ongoing training support and job-specific orientation to new assigned team members.

**Other:**

- Participate in team meetings.
- Contribute to process improvement initiatives.
- Recommend new or revised policies and procedures.
- Perform other duties as assigned.

**Competencies:**

- Ability to lead, mentor, and supervise staff.
- Cultivate and maintain effective working relationships, and foster a cooperative work environment
- Uncompromising adherence to ethical principles

- Knowledge of community services, resources, and entitlements and how to access them.
- Ability to advocate for client's best financial interest, manage finances judiciously and conservatively.
- Ability to develop conscientious client budgets.
- Ability to maintain accurate and timely financial records that meet legal and financial guidelines
- Ability to learn and demonstrate knowledge of the Probate Court system.
- Ability to work independently, organize work efficiently, prioritize response to changing needs of clients.
- Ability to conduct productive interviews, develop evaluations, and provide performance coaching.
- Ability to develop productive relationships with clients, staff, and volunteers.
- 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.

#### **Education and Experience:**

- Bachelor's degree in Trust & Wealth Management, Banking, Accounting, Business, Investment Management, or equivalent education and related training
- 7 years of supervisory experience, and excellent leadership skills to provide a high level of organizational development
- 5 years' asset, accounting, and financial management experience in accordance with GAAP
- Understanding of fiduciary responsibilities and generally acceptable accounting principles
- Strong analytical, problem-solving, interpersonal and relationship skills
- Highly organized with ability to prioritize and work independently, handling multiple tasks simultaneously.
- Planning, organizing, coordinating and directing administrative activities.
- Developing policies, objectives and short-and long-range plans and implementing projects and programs to accomplish goals.
- Developing and maintaining effective and efficient workflow.
- Knowledge of Medicaid, SSA, SSDI, SSI, VA Benefits, and related Representative Payee programs
- Ability to achieve Texas Guardianship Certification within 24 months of hire.
- Proficient in Quickbooks and Microsoft Office applications, especially Excel, Word, and Outlook

#### **Work Environment:**

- Work occurs in both office settings and off site, conducting duties related to Guardianship services.
- Off site visits may include the court, clients' homes, real estate property owned by clients, long term care facilities, financial institutions and other sites related to providing fiduciary services. Requires a significant amount of face to face interaction and phone contact with program staff, clients and outside professionals.
- Frequently involves coordination or participation in physical tasks related to asset management or disposal of personal property (i.e. lifting, hauling, cleaning). Periodically requires visits to properties that have been poorly maintained by clients where unclean conditions often exist (filth, pests, foul odors, etc)
- Ability to safely and successfully perform essential job functions consistent with the ADA, FMLA and other federal, state and local standards, including meeting qualitative and/or quantitative productivity standards.
- Ability to maintain regular, punctual attendance consistent with the ADA, FMLA and other federal, state and local standards
- Must be able to lift and carry up to 30 lbs.

**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. 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:**

