

FAMILY ELDERCARE
Assistant to the Estates Manager
Job Description



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| Job title: Estates Support Specialist | Reports to: Guardianship Estates Program Coordinator |
| Program: Guardianship | Work Location: Rutherford Office |
| Position Status - Full-time FLSA Classification - Non-Exempt | Salary Range - \$24.30-25.03 |

The Estates Support Specialist is responsible for assisting the Estates department in protecting, maintaining, and disposing of Guardianship of the Estate client assets per statutory and court guidelines and orders under the direction of the Estates Manager and Estates Program Coordinator.

Essential Duties and Responsibilities:

- Complete administrative tasks, such as changes of address, setting up client files, initial contact to third parties and vendors, and closing financial accounts as needed.
- Assist with inventorying and marshalling of guardianship estate assets.
- Travel to homes, storage centers, and other locations to organize and secure assets and client property under direction of Estates Manager, including rekeying of property, securing vehicles and obtaining titles, and creating records of estate property.
- Check Unclaimed Property for any Unclaimed funds of the client.
- Assist with maintenance of estate property per court order (liquidate, preserve, hiring 3rd party, etc.) and statutory guidelines.
- Collaborate with Guardianship team in the management of assets according to the Texas Estates Code and fiduciary standards.
- Complete requests for funds to pay bills for estates clients.
- Provide administrative support to Estates team members as needed.
- Assist with mail distribution as needed.
- Other duties as assigned.

Education and/or Work Experience Requirements:

- High School Graduate: Associates Degree preferred.
- QuickBooks Online Preferred
- Experience with property management and banking desired
- Proficient in Microsoft Office products

Working Conditions/Physical Requirements:

- Ability to perform the essential job functions consistently, safely and successfully 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.

- 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

Licenses and/or Certifications:

Valid Texas Driver’s License and active automobile insurance

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 and as a team member, 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: