

Daily Money Manager

EMPLOYER: North Shore Senior Center

AFFILIATE: North Shore Senior Options

REPORTS TO: Director of North Shore Senior Options

FLSA STATUS: Non-Exempt

LOCATION: Northfield, IL

PT/FT: Part-time, as needed

SUMMARY: The Daily Money Manager (DMM) provides ongoing direct services to older adults and those with disabilities by making visits to the client's home on a regular basis. Services meet a continuum of needs, from organizing and keeping track of financial and medical insurance papers, to assisting with check writing and maintaining bank accounts. The purpose of providing this service is to enable clients to prolong an independent way of life with minimum intervention.

DUTIES AND RESPONSIBILITIES:

- Daily Money Manager services include: sorting mail, creating paper and digital financial file systems, setting up Quicken or QuickBooks, paying bills from a designated account, reconciling accounts, preparing and delivering bank deposits, producing cash flow reports, establishing budgets and spending plans, resolving creditor disputes, organizing tax documents and other paperwork, investment and insurance reviews, keeping track of assets, insurance reconciliation, notary services, and coordinating with other financial professionals (accountants, financial planners, etc.).
- Provides services primarily in the home, but may also provide services in the office, in a hospital, in a residential facility such as independent living, assisted living, skilled nursing or in other locations.
- Conducts an initial client interview and completes client information sheet with monthly income and expense information, asset information, and contact information for other financial professionals as well as an emergency contact.
- Visits clients monthly (at a minimum) at a pre-determined, mutually convenient time.
- Completes and submits a monthly report to the program director for each client.
- Communicates safety or health issues identified during a visit to the Senior Options Director.
- Completes a review of client files periodically and at discharge to ensure files are current and contain all required information.
- Completes all required paperwork in a timely manner.
- Records all time spent on client-related tasks, including travel time, in the agency's information system.
- Responds to medical emergencies and performs CPR/AED and First Aid.
- Performs other related duties as assigned by management.

SUPERVISORY RESPONSIBILITIES:

- This job has no supervisory responsibilities.

QUALIFICATIONS:

- Bachelor's Degree (BA, BS, or BBA) from four-year college or university in Accounting, Finance, or similar, applicable field.
- At least one year of experience in providing Daily Money Management
- Certificates, licenses and registrations required: Current CPR/First Aid, or willingness/ability to become certified.
- Computer skills required: knowledge of basic computer programs including the Microsoft Office suite of programs, Quicken and QuickBooks; Ability to use current mobile technology such as smartphone and tablet/laptop to enhance communication and to access the agency's information system and resources from remote locations in order to provide services more efficiently and effectively.
- Other skills required:
 - Advanced knowledge and experience developing and managing small business and household budgets.
 - Experience managing and accuracy in maintaining financial records.
 - Passion for working with and serving older adults and experience working with the older adult population.
 - Experience working with clients at home in the community, preferred.
 - Patience and tactfulness; ability to work cooperatively with a wide variety of individuals, including people with significant physical and mental impairments and varying socioeconomic backgrounds; ability to persist when dealing with government or community agencies.
 - Strong problem-solving abilities, resourcefulness, ability to multi-task, and ability to work efficiently.
 - Ability to build relationships working with clients, family members, colleagues, community members and other stakeholders.
 - Ability to work well as part of a team, as well as be a self-starter and work independently in the field.
 - Sensitivity to cultural diversity.
 - Strong written and verbal communication skills.
 - Knowledge of HIPAA privacy rules and ability to maintain records and information accordingly.
 - Availability to occasionally provide services outside of the normal business hours of 9am-5pm.
 - Current driver's license, current insurance and access to a reliable car required.

To be considered for this position, please send your resume and salary requirements to hr@nssc.org.

EEO: North Shore Senior Center is an equal opportunity employer; applicants are considered for all positions without regard to race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), marital status, parental status, national origin, age, disability, veteran status, genetic information, or any other status protected by applicable federal, state or local law.