

Daily Money Manager, Senior Options

Part-Time

The **Daily Money Manager** (DMM) provides ongoing direct service to clients who are disabled or elderly 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.

Daily Money Management 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
- Coordinating with other financial professionals (accountants, financial planners, etc.)

**The DMM is not expected or authorized to sign checks or manage any other assets except for the designated checking account.*

Essential Functions

- 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 Program 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.

Requirements

- BA, BS or BBA or similar degree in Accounting, Finance or applicable field.
- At least one year of experience in providing Daily Money Management or similar services, preferred.
- 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.
- Knowledge of the aging process and chronic disorders including Alzheimer's disease and other dementias, preferred.
- 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.
- 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.
- Ability to make independent decisions when such action is warranted.
- Availability to occasionally provide services outside of the normal business hours of 9am-5pm.
- Knowledge of basic computer programs including the Microsoft Office suite of programs.
- 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.
- Current CPR/First Aid, or willingness/ability to become certified.
- Current driver's license, current insurance and access to a reliable vehicle required.
- Free of communicable diseases as determined by an annual TB test.

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