

Care is There Geriatric Care Management

Daily Money Management Job Description

Utilize Your Financial Skills to Make a Difference

Are you an experienced financial professional who enjoys working with the elderly? A part time job with Care is There Daily Money Management may be perfect for you. This is rewarding work you can do mostly from home, on a flexible schedule, with the local support of a positive and innovative team.

Detailed Duties and Requirements:

Although client needs vary widely, typical duties for a Daily Money Manager include:

- Paying bills for clients
- Filing insurance claims for clients
- Producing financial analyses to help clients and their families choose between options
- Designing bank account structures for simplicity and security
- Implementing best practices to help protect clients from fraud
- Performing bookkeeping functions and maintaining financial records
- Interfacing with other professionals such as tax accountants, financial planners, and attorneys about the needs of the client
- Supervising and auditing the work of Care is There employees who help clients write checks, reconcile bank accounts, and manage paperwork
- Collaborating with Care is There Lifestyle Coordinators to help clients receive all the services they need
- Meeting with potential referral sources to educate them about our services and develop referral processes
- Meeting with potential clients to offer services

All Daily Money Managers are required to:

- Have the skills to use the Google Suite (Gmail, Google Sheets, Docs, Drive etc.), Quickbooks, and Quicken. Be willing to learn new software applications
- Be a trustworthy and reliable resource for elderly clients and their families
- Be comfortable working with clients who have conditions like frailty and dementia
- Be willing and able to listen compassionately to the needs of clients and their families and to develop creative, efficient and effective solutions
- Be able to proactively, confidently and effectively negotiate positive outcomes with other professional service providers, client family members, and fellow team members
- Be willing and able to embrace and expand the Care is There best practices approach to client service
- Have a schedule that allows for regular on-site visits to each client as needed and remote supervision of on-site staff
- Work independently as well as with a team
- Dress and otherwise present themselves as a professional
- Have a car in good working condition and appropriate for occasional transport of clients: clean, presentable, easy for clients to enter and exit, and be able to accommodate a walker.

Education and Experience:

Required

- College degree
- Bookkeeping experience including Quickbooks, Quicken, Google Sheets, and manual reconciliations
- Experience designing and presenting basic financial reports to highlight decision-making options
- Experience leading and managing others
- Experience working with professionals such as attorneys, tax accountants and financial planners
- Experience handling situations that require flexibility, patience, and creativity
- No criminal record

Preferred

- Professional experience with the elderly or special needs clients
- Sales experience or training

Characteristics

- Skillful
- Resourceful
- Proactive
- Empathetic
- Effective communicator
- Effective leader
- Responsible, reliable
- Process-oriented
- Organized
- Professional presentation
- Calm demeanor

Miscellaneous:

- Care is There work is part time, non-benefited and sometimes unpredictable. Full time work is not available.
- Care is There Daily Money Managers are employees of Care is There and covered under liability and bonding insurance, but employees must provide automobile insurance to the standard \$100,000/\$300,000 coverage.
- Background checks, credit checks, drug tests, tuberculosis tests and reference checks are conducted on all potential Care is There employees.
- A non-compete agreement is required, in which employees agree to not seek or accept employment outside Care is There with any current or past Care is There client family.

