



## **Daily Money Manager/Personal Finance Manager**

Surrey's mission is to inspire and enable all of us, as we age, to live with independence and dignity, and as engaged members of the community. We are seeking a Daily Money Manager to work with our seniors, assisting them with financial matters.

As a Daily Money Manager for Surrey Services, you will **visit older adults in their homes** to provide customized help with bills, mail, bank statements, tax information, budgeting, insurance paperwork, government forms, and more.

### Responsibilities:

- Develop budgets and track income and expenses
- Organize and purge files, pay bills, handle mail, reconcile accounts
- Advise on selecting medical, prescription, and utility plans
- Review insurance policies explaining coverage, manage claims and assist with LTC insurance, determine eligibility and file applications for government benefits
- Assist with financial and administrative tasks after the loss of a loved one
- Assist clients with budgeting and debt management.
- Stay up-to-date on financial trends, regulations, and best practices
- Collaborate with other professionals, such as accountants and attorneys, to provide comprehensive financial solutions
- Build and maintain strong relationships with clients to ensure their long-term financial success

### Requirements:

- Bachelor's degree in finance, accounting, or a related field
- Previous experience in banking or public accounting preferred
- Strong knowledge of personal finance

- Ability to stay up-to-date on financial trends, regulations, and best practices
- Excellent customer relationship management skills
- Strong communication and presentation skills

If you are a motivated individual with a passion for finance and helping older adults maintain their independence, we would love to hear from you!

Job Type: Part-time, 16-24 hours per week (pay: \$25/hr)

Work Location: Varies depending on assigned clients

EQUAL OPPORTUNITY: Surrey Service considers candidates for all positions on the basis of qualifications and without regard to race, color, religion, gender, national origin, genetic information, age, physical or mental disability, sexual orientation, marital status, or status as a Vietnam-era or special disabled veteran or other protected classification and in accordance with applicable federal, state, and local laws. Surrey Services reserves the right to change this job description as conditions change.

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