

**Guardian Finance and Advocacy Services  
Conservator Support Specialist  
Position Description**

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**Position:** Conservator Support Specialist

**Responsible to:** Director of Client Financial Svcs

**Employment Status:** Part- Time/Hourly

**Revised:** 9-18

**General Description:** The Conservator Support Specialist is responsible for providing administrative & clerical support to the Conservator functions.

**Specific Responsibilities:** The person in this position is responsible for the following duties:

- Assist Benefits Specialist to Complete benefits and insurance applications on behalf of clients, and completion of Medicaid & Medicare Part D applications.
- Prepare paperwork regarding transfer of client financial accounts, changes to direct deposits (For established clients only)
- Pull required documents for Accountings, and then hand them off to the conservator worker for them to review.
- Prepare financial institution/Bank Letters and send out (For established clients only), request financial statements, complete address changes.
- Receiving and making phone calls which will include communication with Vendors, clients, agencies to coordinate services, etc.
- Process address changes & relocation notices on Conservator only clients
- Assist conservator staff in completing tasks on each “new client checklist”
- Maintain client files to include scanning, legal files, and working files. Set up new working files as needed. (See description of working file)
- Maintain Real Estate inventory report & update AIM
- Assist Conservator in purchasing funerals & updating reports & AIM

- Assist in gathering documents required to prepare client Inventories and Accountings.
- Review Annual Account & Statement of Fees prior to submission to Probate Court.
- Notice Inventories & Accountings as required by Probate Court. Ensure all documents are properly filed regarding notices completed.
- Communicate with professional agencies, attorneys, CPAs
- Running errands such as going to financial institutions, Probate Court, client shopping, etc.
  
- All other duties as assigned by Conservator &/or Director of Financial Svcs

**Qualifications:**

- Associate Degree in Finance, Accounting, Paralegal or 3 years of experience preferred in office administration
- Experience working with vulnerable population including difficult people
- Ability to work well under pressure
- Ability to perform multiple tasks with multiple deadlines
- Excellent organizational and communication skills
- Knowledge of Auto & Real Estate ownership + maintenance