

PT Personal Finance Specialist for older adults
10 – 30 hours/week

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 Personal Financial Specialist to work with our seniors assisting them with financial matters.

As a Personal Financial Specialist 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
- Conduct financial analysis and develop personalized financial planning
- 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 cash management
- Ability to stay up-to-date on financial trends, regulations, and best practices
- Excellent customer relationship management skills
- Ability to conduct thorough research and analyze financial concepts
- Proficient in portfolio management software and other financial tools
- Strong communication and presentation skills

If you are a motivated individual with a passion for finance and helping older adults remain in their community, we would love to hear from you. Join our team today!

Please apply using Indeed.com at

<https://www.indeed.com/jobs?q=Surrey+Services+for+Seniors&from=googlesl&vjk=d9ee35d6e7c6b4f6>

Benefits:

401(k)

401(k) matching

Employee assistance program

Flexible schedule

Health insurance

Life insurance

Referral program

Weekly schedule:

Choose your own hours

Work setting:

In the field

Experience:

Personal finance: 3 years (Preferred)

Work Location: remote