



Position Description

Job Title **Consumer Financial Services Specialist** **July 2017**

FSLA Status – Non-Exempt

Summary

Atlantis Community, Inc., has been the Center for Independent Living in the Denver Metropolitan area for over 40 years. We support the right of people with disabilities to take control over their own lives with full and informed consent by providing advocacy, education, transition services, information and referral, and peer support. As an I.L. Specialist, you will be a part of the Independent Living Staff and a member of the Atlantis Community team.

Atlantis Community, Inc. (ACI) assists people with disabilities in learning the skills necessary to increase independence in managing their money. This position is responsible for empowering consumers to become as independent as possible in managing their finances. This includes, but is not limited to, teaching consumers how to develop a budget, pay bills, manage cash flow, and reduce debt. The Consumer Financial Services Specialist maintains a caseload of clients for representative payee and financial services. If ACI is not the representative payee, the services provided are only those that meet an expressly stated goal outlined in the Independent Living Plan. This position will work directly with consumers and families in a professional and transparent manner.

Essential Duties and Responsibilities

- Process applications for representative payee services
- Work with consumers to create and maintain a stable budget
- Ensure bills are paid accurately and on time
- Ensure representative payee accounts comply with ACI and Social Security Administration (SSA) requirements
- Ensure funds from representative payee accounts are used to meet the basic needs of food, shelter, clothing, and medical care
- Complete required reports such as redeterminations, representative payee reports, HUD
- Assist in securing housing if the consumer is currently or is at risk of homelessness
- Participate in internal control processes including account reconciliation and internal audits
- Participate in external audits including coordinating file reviews and consumer interviews
- Ensure proper documentation of all accounting, case work, and reports
- Maintain an accurate and complete financial record for all Representative Payee consumers

- Ensure records for consumers who request financial services contains an agreement of which services we provide and the record reflects the outcomes of those services
- Be available for appointments with consumers to provide spending money as determined by their individualized budgets
- Enter all transactions for Representative payee consumers into QuickBooks
- Collaborate with provider agencies to develop individualized approaches so consumers have access to their funds while complying with requirements
- Assist with other consumer financial services needs as they arise
- Help consumers identify and reach their goals related to financial empowerment and independence
- Identify areas of spending that can be covered by other community services, such as food assistance, Medicaid, Medicare, etc
- Work closely with independent living specialists who are working with consumers on other goals such as employment
- Ensure necessary changes are reported to SSA such as employment status
- Implement the *Your Money Your Goals* and *Money Smart* Programs
- Develop and maintain a desk reference guide for both representative payee and financial services programs
- Attend required training at SSA and other training as applicable
- Outreach support, employee will be asked to go out into the community and distribute marketing materials for programs and workshops

Qualifications

Knowledge, Skill and Ability

- Experience with QuickBooks
- Experience working with people with significant disabilities, including invisible disabilities such as mental health conditions
- Experience working with people who experience homelessness
- Knowledge of available community resources, food assistance, housing options, Medicaid, Medicare, and SSA programs

Education and/or Experience Required

- Five years experience working with people with disabilities in a community setting including three years assisting with money management or serving as representative payee
- Bachelor's degree in human services or related field
- Combination of education and experience will be considered
- Must be able to travel to banking institutions, county offices, SSA offices, or consumer homes
- Knowledge of basic accounting processes

Physical Demands

- Must be able to travel occasionally
- Must be able to sit for 30-60 minutes at a time at a desk
- Must be able to practice self-care techniques at work to avoid occupational burnout



Atlantis Community, Inc.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The qualifications, working environment, and physical demands described above are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Compensation/Benefits

Benefits include medical, dental, vision, and paid time off

Important Notes

- This position is Full-Time (40 hours a week), fully benefited position
- Hours are Monday through Thursday, 8:30AM - 5PM and Friday, 8:30AM – 4PM, schedules will be set during those times

To Apply

Submit a resume and cover letter to hr@atlantiscommunity.org by Wednesday, 1/2/2019. People with disabilities are encouraged to apply. Please include the position title in the subject line.