

Job Title: Financial Caseworker for Older Adults

Supervisor: Senior Director of Programs

Job Status: Non-Exempt/ Full Time

Job Hours: 35 hours per week

Location: Hybrid work schedule 3-4 days in Midtown office; 1-2 days virtual

Compensation: \$50,000-\$55,000 with potential for annual bonus

About Encore: Known widely as *Broadways longest running act of loving care*, Encore's mission is to improve the quality of life for older New Yorkers so they are not just surviving, but thriving. Through a robust array of programming, Encore takes a "no wrong door approach" to ensure Seniors are able to age in place comfortably for as long as possible. **Encore is recognized as one of the most respected and trusted nonprofit organizations providing services for older New Yorkers in New York's City.** Encore is on the cutting edge in the human service field and is a staunch advocate not only for older New Yorkers, but also for the essential human service employees who serve as the City's safety net. **Do not miss this chance to work for a mission-oriented organization, which centers employees as its number one resource.**

About Position: Encore works with thousands of older New York's and over half of them are low-income with many living at or below the national poverty level- in one of the most expensive cities in the world. Encore has set a goal to improve the financial wellbeing of 1,000 vulnerable older Adults by 2026, and the financial caseworker plays a central role in achieving that goal. Through one-on-one and group sessions, the Financial Educator will build seniors' confidence in money management and will help them to overcome financial difficulties and develop financial literacy skills. In some cases, the Financial Caseworker will serve as the Social Security Representative Payee (Rep Payee) for older New Yorkers who are no longer able to manage their accounts; and for other most independent older Adults, the caseworker will offer budgeting tips, debt reduction education, and general financial literacy support.

Benefits: This position is a full-time position with benefits that include medical insurance (with Employee contribution), Dental, Visions, generous paid time off (vacation, personal days, sick days and earned floating holidays), 403(b) with 5% Employer Match after a year of employment, Flexible Spending Account, Dependent Care and transit benefits.

Job Responsibilities:

General:

- Help lead the implementation of Encore's goal to improve the financial wellness to 1000 older New Yorkers by December 2026;
- Create and maintain respectful and trusting relationships with senior members;
- Work collaboratively with staff in other departments to uphold Encore's mission;
- Participate in client focused meetings with Encore's residential and senior center wellness teams;
- Participate in ECS committees and workgroups as appropriate;

Financial Education

- Help seniors manage their monthly bills by co-creating monthly budgets with them;
- Help improve credit by reviewing credit reports and creating credit repair action plans;
- Provide resources and tips on how to build savings on a fixed income;
- Manage relationships with external partners and facilitator to schedule classes and workshops on budgeting, end of life financial planning, entitlement benefits and more;

Representative Payee:

- Work with seniors who have the need and interest for representative payee support, and help them apply with Social Security administration to identify Encore as representative payee;
- Meet with representative payee clients on a regular schedule to establish budget and savings goals;
- Create/Maintain Monthly and Weekly distribution spreadsheets with seniors' budgets and track payments including third party payments in client ledgers to reflect payments and spending each month and process budget modification's as necessary;
- Monitor account balances monthly to ensure compliance with SSI and Medicaid resource limits;
- Maintain close communication with SSA, and ensure information is updated and program operates in compliance with all SSA guidelines; includes completing annual reporting;
- All other duties as assigned

Qualifications and other job requirements:

- Associates or bachelor's degree in Finance, Accounting, Business Administration or equivalent education/experience strongly preferred;
- Candidates who have previous professional experience with financial advisement and budgeting experience strongly preferred, especially candidates reinterring the workforce after retirement;
- Be flexible, supportive and to work cooperatively with staff as a member of a diverse team. And provide highest level of customer service;
- Proficiency with automated systems and willingness and ability to learn new software packages; Extensive knowledge of Microsoft Office applications; particularly Word, Excel, and Outlook;
- Work independently, with initiative, and handle multiple priorities and tasks;
- A sense of compassion, understanding and empathy for the elderly population;
- Some occasional weekend and evening work may be necessary.
- Experience working with persons with disabilities, homeless individuals and/or older adults, preferred;
- Bilingual preferred.

How to apply: Email Resume and Cover Letter to jobs@encorenyc.org. In the subject line, please indicate "**Financial Caseworker for Older Adults**"

All new hires must be vaccinated against the COVID-19 virus, unless they have been granted a reasonable accommodation for religion or disability. If you are offered employment, this requirement must be met by your date of hire, unless a reasonable accommodation for exemption is received and approved by Encore Community Services.

Due to the high volume of applicants, only qualified candidates will be contacted. No phone calls please. Encore Community Services is an equal opportunity employer and does not discriminate on the basis of race, color, gender, socio-economic status, marital status, national or ethnic origin, age, religion or creed, disability, or political or sexual orientation. Reasonable accommodations may be made to enable individuals with disabilities as defined by the ADA to perform the essential functions of the job.