

**Agency Name:** The Senior Source

**Job Title:** Financial Case Manager

**Job Description (including hours and responsibilities):** Full time: Reports directly to the Senior Financial Case Manager and works under the supervision of the Assistant Director. The Financial Case Manager is responsible for providing direct client services in the areas of representative payee case management under the directive of the Social Security Administration, financial services support, and financial coaching for financially independent clients. The goals of the money manager role are to support the physical and financial independence of vulnerable program clients and implement money management support as a lesser restrictive alternative to guardianship whenever possible. As a team member of the Elder Financial Safety Center, the Financial Case Manager will integrate into a cross-functional team with the primary focus of addressing the economic security of adults 50 and over. This position does not have direct reports.

**Job Location:** 3910 Harry Hines Blvd, Dallas, TX 75219

**Qualifications:**

- Three to five years of any combination of training, education and experience that is equivalent to client service delivery, social work, financial services or financial coaching listed above and that provides the required knowledge and abilities.
- Ability to motivate clients and train and guide other staff in more complex case activities.
- Ability to analyze complex work situations accurately and adopt effective courses of action.
- Ability to carry out assignments and projects without detailed instructions.
- Ability to understand, simplify and communicate complex functionality to colleagues, clients and the community.
- Excellent verbal, written and communication skills.
- Ability to thrive in a fast paced, deadline driven environment.
- Capacity to work in a first of its kind program that requires a high level of adaptation and willingness to be flexible as the project evolves.
- Bilingual in Spanish preferred.
- Four-year college degree required.
- Experience with technology and data management systems.
- 25 percent of the job requires local travel within the agency's service area.

**Link to application web site (if applicable):** <https://theseniorsource.org/wp-content/uploads/2020/06/Financial-Case-Manager.pdf>

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