

Title: Director of Fiduciary Services

General Description of Duties: The Director of Fiduciary Services of the Diablo Valley Foundation for the Aging (DVFA) performs fiduciary duties on behalf of the Foundation and its clients including the prudent administration, investment, monitoring and distribution of money, property and other assets and manages all accounts in accordance with applicable legal requirements.

Essential Job Functions Include:

- Timely relationships with banks and other financial institutions
- Use of Powers of Attorney for Finance; Trustee, Executor, and Conservator Services; Money Management.
- Above includes probate, living and testamentary trusts, investment advisory and custody accounts, escrow in real estate transactions, employee benefit trusts
- Procure professional services as appropriate to fulfill special needs of trust clients
- Determine, secure and administer trust assets for which DVFA has responsibility.

Minimum Qualifications:

- Minimum Bachelors Degree in Business, preferably with Finance major
- Holds California Fiduciary License with minimum three (3) to five (5) years experience
- Up-to-date meeting of Fiduciary Continuing Education requirements under California State Law
- Previous financial management experience preferred
- Has commitment to serving the senior population.

- Experience working well with a multitude of personalities, especially seniors. Sensitivity to, patience and respect for individual needs, including those of family members of frail elderly.
- Excellent communication skills—verbal, non-verbal and written.
- Proficient in communication technologies—Microsoft Office, Access, project management software.
- Must have acceptable background screen, including DMV record and credit check. Have adequate auto insurance coverage. Must have negative TB screen.
- Trained in HIPAA and able to maintain total confidentiality of client information.

Amount of Supervision: Minimal

Reports to: Executive Director