



Health Projects Center

Money Manager (part-time) – Flexible Hours

Health Projects Center www.hpcn.org is recruiting a part-time (30 hours + monthly) money manager to assist frail older adults with daily money management. Health Projects Center is a non-profit health organization that has served California's Central Coast with health and social service programs since 1980. This position is based in our downtown Santa Cruz office but will require significant travel in Monterey and Santa Cruz Counties.

Duties and Responsibilities:

The money manager assists older adults in managing personal budgets and finances. The money manager will go to client's homes to assist with getting bills paid on time and making sure that financial accounts are in order. The goal of the program is to support older adults with health issues to stay safely at home. A money manager may assist with:

- Balancing checkbook
- Reconciling checkbook register with bank statement
- Keeping track of monthly bills and preparing checks for payment
- Preparing a monthly budget
- Making phone calls related to accounts
- Preparing cashless deposits
- Identifying financial assistance programs

Required:

- Excellent organizational skills
- Strong knowledge of personal financial management and banking
- Experience and skills with Microsoft Office applications
- Experience working with older adults
- Detail oriented
- Willingness to travel in Santa Cruz and Monterey Counties and possess reliable transportation
- Reliable, professional, patient individual
- High School Diploma or Equivalent
- Strong communication and customer service skills
- Clean background check

Preferred:

- Experience with bookkeeping and/or financial management
- Experience with health care and/or social services
- Spanish language fluency