



The Arc New York.
29 British American Blvd.
Latham, NY 12110
(518) 439-8311 • Fax: (518) 439-1893
www.thearcny.org
www.nysarctrustservices.org

JOB DESCRIPTION

Job Title:	Account Manager
Revision Date:	01/2021
Department:	Trust Services
Direct Reports:	4-10
Reporting:	Trust Director
Status:	Full Time / Exempt
Location:	Latham
Travel Required:	Some

POSITION OVERVIEW

The Account Manager will oversee daily processing functions to ensure the timely and accurate preparation and/or review of disbursements for all Trust programs as assigned. The Account Manager will manage relationships and communications with beneficiaries, family, representatives, government offices, etc. during the lifetime of these trust accounts.

The incumbent will report directly to the Trust Director. The primary responsibility of this position is to provide support to the Trust Director and to support other functions of the NYSARC Trust Services programs. The Account Manager will supervise several staff members and will coordinate operational aspects of all trust programs as assigned.

RESPONSIBILITIES

- Understand and have the ability to perform all the job duties of the team
- Lead, mentor, train, and evaluate team members
- Direct and indirect supervision of Team Leaders, Account Representative I and Account Representative II.
- Indirect supervision of other Trust Services team members on an as needed basis
- Maintains staff by recruiting, selecting, and orienting employees while maintaining a safe and secure work environment
- Complete direct report evaluations and promote ongoing staff development through mentorship and training
- Ensure the timely and accurate completion of work
- Administers trust policies and procedures according to the policies and procedures for that respective area
- Be involved in review and drafting of policies and procedures on an ongoing basis
- Research and problem resolution as needed
- Daily communication with internal staff, as well as, external parties
- Assist with maintenance of beneficiary files as needed
- Ensure beneficiary correspondence records are maintained
- Utilize Access and become proficient in the Workflow system for all trust related tasks
- Responsible for review and response to incoming written correspondence for assigned areas
- Ensure distributions are made in compliance with regulations, court orders and internal policies
- Assure appropriate staffing coverage to maintain smooth workflow



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- Assist with annual trust audit as necessary
- Handle customer calls requiring supervisor intervention
- Work on projects assigned by management and/or leadership staff
- Any other duties as deemed necessary for NYSARC Trust Services operations

KNOWLEDGE, SKILLS AND ABILITIES

Knowledge: Ability to understand the administration of supplemental needs trusts and government benefits.

Skills: Requires strong organizational and supervisory skills. Proficient in Microsoft Office applications including Word, Excel, Access, Outlook and PowerPoint. Also requires excellent interpersonal, communication skills, and strong analytical and research skills.

Personal Attributes: Must maintain strict confidentiality in performing the duties of the Distribution Manager and must also demonstrate the following personal attributes: be honest and trustworthy, be respectful at all times, possess cultural awareness and sensitivity and be flexible. Must also be able to work in fast paced environment and be pleasant and courteous on the phone and to co-workers.

MINIMUM REQUIREMENTS

- 4 year degree in Business, Accounting or related field. Equivalent experience in a similar position may be considered.
- 2 plus years experience working with financial transactions, bookkeeping, or business operations.
- 1 plus year experiences supervising multiple staff required.
- Knowledge of supplemental needs, Medicaid, and other government benefits a plus.

CERTIFICATION

The above statements are intended to describe the general nature and level of work being performed by the incumbent of this job. They are not intended to be an exhaustive list of all responsibilities and activities required of the position.

I certify that I have read and understand the responsibilities assigned to this position.

_____ Date: __/__/__
Employee Signature

Printed Name

_____ Date: __/__/__
Supervisor's Signature

_____ Date: __/__/__
Sean Wade, Chief Operating Officer

Employee File Copy

Main Office Copy