



LIFE NAVIGATORS POSITION DESCRIPTION

POSITION TITLE: Trust Information Coordinator (Trust & Futures Planning Program)

REPORTS TO: Trust Program Manager

CLASSIFICATION: Exempt

SUMMARY: Working collaboratively with the Trust Team, the Trust Information Coordinator focuses on providing information and outreach to families and professionals on the Life Navigators Trust Program to build awareness of the program and trust options that benefit persons with disabilities. Additionally, the coordinator will respond to trust program inquiries and provide ongoing service and support to Trust I beneficiaries and their families.

PRIMARY RESPONSIBILITIES:

1. Coordinate services to ensure that individuals with disabilities, their families, and their loved ones have peace of mind and a plan for their future, including a financial plan.
2. Coordinate trust interest services for individuals with disabilities, their families, and legal and financial planning professionals to provide information on trust services.
3. Provide community-based information education events and training programs and participate in events and resource fairs to dispense information on the trust services and the importance of a financial plan for individuals with disabilities.
4. Provide direct services for all Trust I individual beneficiaries and grantors for funded and unfunded trusts, as well as ongoing service support and coordination to Trust I beneficiaries, including coordination with advisors and legal professionals.
5. Conduct the initial assessment and maintain ongoing contact and support of all Trust I beneficiaries.
6. Under the leadership of the Trust Program Manager, work to carry out the program's strategic goals and objectives and maximize program opportunities and expansion.
7. Collaborate with the Life Navigators Trust Team to expand programming to the number of individuals with disabilities with a trust in place.
8. Work with Trust Program Trustee to provide direct service and support to beneficiaries, including processing and overseeing trust disbursements.
9. Participate in Life Navigators Trust Committee meetings.
10. Maintain accurate information and documentation for programming, including conducting assessments and preparing reports, correspondence, and program documentation for agency purposes and funding sources. Provide program reporting and billing.
11. Work with partner organizations to increase service collaboration and programming opportunities for Trust I beneficiaries.
12. Identify and access community resources and resolve crisis issues affecting Trust I beneficiaries' well-being.
13. Create a network of support and cooperation among families, professionals, community agencies, and others involved in the well-being of individuals with disabilities.
14. Increase multicultural outreach and access to programs by minority and other underserved populations to ensure all individuals with disabilities have access to services.
15. Administer policies and procedures effectively and perform related work as required or delegated by the supervisor.
16. Other duties as assigned that impact Trust beneficiaries.

QUALIFICATIONS:

1. Bachelor's Degree in Social Work or related field.
2. Experience in program development and the ability to network with various stakeholders.
3. Excellent written skills with the ability to communicate critical information clearly and promptly.
4. Excellent problem-solving and analytical skills.

5. Experience serving individuals with developmental disabilities and knowledge of the service system. A commitment to independence goals for individuals with disabilities.
6. Knowledge of long-term care and public benefit programs impacting persons with disabilities.
7. Knowledge of financial planning and Special Needs Trust is a plus.
8. Excellent computer skills, including knowledge of Microsoft Office Suite and database systems.
9. A valid Wisconsin Driver's license, vehicle and insurance.

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RECEIPT ACKNOWLEDGMENT**

Employee

Acknowledgment

Date:

The above statements reflect the general details necessary to describe the principle functions of the occupation described and shall not be construed as a detailed description of all the work requirements that may be inherent in the occupation.