



## CLASS SPECIFICATION

Class Code: 60019178  
Date Established: 07/2022  
Last Reviewed:  
Last Revised:  
Last Title Change:  
FLSA: non-exempt  
Probation: 12 months

### ESTATE ACCOUNT SUPERVISOR

#### **DEFINITION**

Under direction, plans, organizes, and administers fiscal operations related to the management of the assets and liabilities of a protected person ensuring compliance with all applicable regulations and standards; and performs related work as required.

#### **EXPERIENCE AND TRAINING REQUIREMENTS**

A bachelor's degree from an accredited college or university in accounting, finance, business administration or a closely related field, AND three years of full-time experience in accounting, estate administration, tax preparation, entitlement policy and regulation or fiscal management to include one year of supervisory or lead experience; OR an equivalent combination of training and experience.

#### **LICENSE OR CERTIFICATE**

A valid driver's license is required at the time of appointment.

#### **SUPERVISION EXERCISED**

Exercises direct supervision over clerical and technical support staff.

#### **EXAMPLES OF DUTIES** *(The following is used as a partial description and is not restrictive as to duties required.)*

Participate in all initial, termination, property, and financial case planning meetings; provide analysis of overall financial management for the estates of protected persons in order to direct task assignment for various staff, within statutory authorities granted by the court.

Develop policies and procedures to ensure the department is operating in accordance with Generally Accepted Accounting Principles (GAAP), is in compliance with accepted business practices and fiduciary duties of multiple agencies and adheres to Nevada Revised Statutes and National Guardianship Association fiscal standards.

Coordinate and oversee specialized fiscal projects; complete all internal county semi-annual reporting to Treasurer and Comptroller for all bank accounts of protected persons.

Analyze each protected person's estate for tax filing requirements, prepare tax returns on simple estates, coordinate services and review accuracy of work of external accountant on larger estates; serve as department liaison for County banking institution.

Supervise assigned staff, which includes staff selection; assigning, scheduling, and reviewing work; providing training in proper work methods and procedures; providing professional development, coaching, and mentoring; writing performance evaluations; and implementing discipline and conflict resolution procedures when necessary.

Create, review, and monitor adherence to fiscal controls; prepare and complete requests and compliance corrections related to external audits.

Examine tasks associated with closing guardianship estates and review all estate terminations for compliance with proper distribution in accordance with Nevada Revised Statutes.

Assist customers, departments and employees by providing fiscal information, explaining procedures and answering questions; provide technical information and instruction regarding applicable procedures and methods to other County staff; resolve complaints in an efficient and timely manner.

Conduct research and compile information and statistics; develop reports and other written material; establish and maintain complete files and records related to assigned function.

Conduct training for clerical, technical, and case management staff on various aspects of estate management.

Ensure that assigned staff performs duties and responsibilities in a safe and prudent manner that does not expose them or others to unnecessary harm or risk of on-the-job injury.

## **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

**Full Performance Level** *(These may be acquired on the job and are needed to perform the work assigned.)*

### **Knowledge of:**

Washoe County and departmental organizational structure, policies, and procedures.

Federal, state, and local laws, rules, regulations, and procedure applicable to assigned position and department operations.

Financial management principles, vehicles, resources, eligibility requirements, and other related information needed to manage complex estate cases.

Federal, State, and County benefit programs.

Federal income tax preparation.

Software specific to the area of assignment.

Court procedure as it relates to estate guardianship.

### **Ability to:**

Interpret and apply laws, rules, regulations, and procedures related to estate management for the estates of protected persons.

Comprehend complex fiscal analysis related to guardianship and estate management.

Provide guidance to staff on various aspects of estate case management.

Select, supervise, and evaluate the performance of assigned staff.

Audit fiscal staffs' work and make corrective adjustments, if needed.

Adhere to fiduciary and privacy standards.

**Entry Level** *(Applicants will be screened for possession of these through written, oral, performance, or other evaluation methods.)*

### **Knowledge of:**

Principles and practices of budgeting, GAAP, cost/benefit analysis, forecasting, fiscal impact analysis, and sound financial management.

## Federal and State Entitlement Programs

Methods and techniques of financial and statistical data collection and report preparation.

Fundamental concepts related to insurance, taxes, benefit programs, and legal court processes.

Principles of general office management, supervision, and training.

Computer software and hardware used for fiscal analysis and financial management.

### **Ability to:**

Read and interpret a variety of financial and accounting reports, summaries, and budgets.

Analyze information, project consequences, formulate alternative solutions and make appropriate recommendations.

Research and compile financial and accounting data and information.

Accurately perform mathematical calculations.

Write reports, financial summaries, correspondence, memoranda, and other documents.

Prepare and deliver written and oral presentations to internal and external stakeholders.

Communicate clearly and concisely both orally and in writing.

Establish and maintain effective working relationships with all those contacted in the course of work.

### **SPECIAL REQUIREMENTS** *(Essential duties require the following physical skills and work environment.)*

Ability to work in a professional office environment. Ability to lift and move objects weighing up to 25 lbs. Ability to operate office equipment including computers, telephones, calculators, copiers, and fax machines.

*This class specification is used for classification, recruitment, and examination purposes. It is not to be considered a substitute for work performance standards.*