

# Market Range Detail - Fiduciary

## Effective Date

February 1, 2016

## Market Range Title Description

### POSITION OVERVIEW

The purpose of this position is to perform a wide variety of activities and services to fulfill the legal mandates of the Public Fiduciary. The Fiduciary is responsible and accountable for performing intakes, referral/court investigations, and case administration related to guardianships, conservatorships, and decedent estate dispositions under the supervision of the Public Fiduciary. Caseloads may be complex, sensitive, and varied in nature. The Fiduciary is assigned primary responsibility for Wards, Protected Persons, and Estates, managing the well-being and assets of vulnerable and deceased persons. The Fiduciary shall adhere to the Arizona Code of Judicial Administration, Arizona Laws, Rules, and Administrative Orders governing Arizona fiduciaries.

### DISTINGUISHING CHARACTERISTICS

This is the journey level class and is distinguished from the trainee level in that they are licensed and are able to complete all functions independently. Furthermore, this class is differentiated from the senior level in that they are given cases of moderate complexity and limited amount of time testifying in court.

### ESSENTIAL JOB TASKS

(This is not an all-inclusive list of all job duties that may be required; employees will be required to perform other related duties as assigned. List in order of importance.)

- Completes mandatory reports and maintains active compliance with law, rules, codes, orders, and department policies;
- Administers estates of protected and deceased persons with emphasis on preservation of the estate and physical maintenance of personal, real, and business property;
- Coordinates, monitors, and oversees the implementation of Ward case, treatment, residential, and continuing care plans;
- Discharges the duties of the guardian, conservator, and personal representative consistent with orders from the Court;
- Performs investigations and gathers information to ensure informed decision-making, with preference given to the Ward/Protected Person's expressed wishes;
- Testifies in court matters related to Ward advocacy, determinations, litigation, recovery actions, and performance accountability;
- Researches, analyzes, and documents property ownership, values, liquidations, purchases, and transfers. Manages or disposes of client property with preference given to the client's expressed wishes or directives;
- Determines end of life and final arrangements with advanced input from the client and his/her family;
- Establishes, maintains, and provides ongoing education regarding the role of the Public Fiduciary in the community while actively participating and communicating with medical, legal, and provider community partners to foster improved client outcomes;
- Proactively obtains government entitlements and maintains a working knowledge of client benefits;
- Organizes and documents information in an accurate and detailed manner to support client activities and benefits performed for accountability and compensation;
- Communicates orally and in writing with Wards, benefit/service providers, financial institutions, residential facilities, medical and legal professionals, and other interested parties, to include communications in adversarial and occasionally hostile situations;
- Drives to community sites, facilities, and institutions;
- Performs other duties as assigned

#### Glossary:

**Market Range Title:** Broad grouping of related positions with like job responsibilities and qualifications. Market Range Titles typically include positions ranging from entry level to senior/lead level unless indicated otherwise.

**Effective date:** The date the salary range was implemented for use.

**Market Range Title Description:** Broad description of sample job duties and responsibilities of positions included in the Market Range Title. Each position included in a Market Range Title also has a job description that is specific to the department. Departments are responsible for writing and maintaining job descriptions for positions in their department. Employee Compensation is responsible for writing and maintaining Market Range Title Descriptions.

**Likely Minimum Qualifications:** Typical minimum qualifications for positions assigned to the Market Range Title. Because a broad group of jobs in different departments are included in a Market Range Title, minimum and preferred qualifications may vary slightly depending on the area of assignment.

**Market Range:** The minimum, midpoint, and maximum salary points for all positions included in the Market Range Title.

**Hiring Range:** The hiring range for all positions is ordinarily the minimum of the market range to the midpoint. The use of a different hiring range must be approved by Employee Compensation. Departments should use a hiring range that is within their funding capabilities and are required to comply with the County's Funded Position Policy ensuring that applicants are extended a rate that is supported by the department's budget.

**Working Title:** The specific title used by a department to identify a position within their organizational structure. Use of working titles is flexible and aimed to assist departments in identifying the unique functions and responsibilities of each position and is representative of the assigned Market Range Title. Ordinarily, supervisory and/or managerial titles should not be used for positions not assigned to a supervisory and/or manager Market Range Title.

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## Market Range

Minimum Hourly Rate	Midpoint / Hiring Maximum	Maximum Hourly Rate
\$22.50	\$26.75	\$31.00

## Likely Minimum Qualifications

- A Bachelor's degree, or an equivalent combination of education and guardian certification or education and specifically relevant work experience gained within the previous ten (10) years, may substitute for the Fiduciary License requirement. Specifically relevant work experience must be in the administration of trust, decedent's estate, guardianship or conservatorship under the supervision of either a licensed fiduciary; bank trust or trust company officer; or a licensed attorney emphasizing in the area of probate, trust, elder, mental health, or disability law.
- Applicant must meet the eligibility requirements pursuant to the Arizona Code of Judicial Administration (ACJA § 7-202) and A.R.S. § 14-5651; obtain Arizona Fiduciary License within 24 months of hire; and, thereafter, must maintain that license in good standing. Must possess, or have the ability to obtain by the time of hire, a valid Arizona driver's license.
- Fiduciary License in good standing with the Arizona Supreme Court.

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