

OPERATIONS ASSISTANT JOB DESCRIPTION

The **Operations Assistant** role ('Employee') is central to furthering Banister Advisors' mission to alleviate the complex emotional and logistical burdens confronting our clients in the face of crisis and loss. This role reports directly to the General Manager and will work in support of and in collaboration with Banister's extended team. This role is responsible for supporting internal operations and contributing to special projects.

In addition to such other duties and responsibilities as may be assigned to Employee from time to time by the Company, in the Company's sole discretion, the Employee shall generally be required to perform the following:

- Participate in regular meetings with the General Manager and at times, the Banister extended team;
- Conduct research and manage updates to internal knowledge management databases related to Banister's Strategic Partners, Preferred Providers/Vendors, relevant media, and other data of interest ;
- Assist in managing the General Manager's calendar
- Support General Manager in creating client invoices
- Lead development of client case studies
- Conduct research and create summarized reports for internal training/reference and external sharing
- Occasionally partner with Banister Navigators and Expeditors to maintain key data in client files according to company policies and procedures for event logging, progress tracking, key performance indicator tracking, etc., in alignment with the client-specific Plan of Care

MINIMUM QUALIFICATIONS

- Undergraduate Degree with relevant work experience in administrative functions
- Demonstrated academic excellence in both undergraduate studies and graduate program settings
- Experience and ability to both work as part of a team as well as function independently, and to coordinate activities as appropriate to accurately complete tasks in a timely manner
- Desire to be part of a remote team and virtual office with most tasks to be completed on a flexible daily and weekly schedule

REQUIRED SKILLS AND ATTRIBUTES

- Excellent verbal and written communication
- Knowledge management
- Data analysis
- Documentation
- Calendar management
- Primary and secondary research, including interviews
- Extensive experience with Microsoft Office Suite (PowerPoint, Excel, Word)
- Emotional intelligence and ability to connect with all team members and other partners in a respectful and compassionate manner
- Capability of understanding and maintaining the highest level of integrity, confidentiality, and discretion in all client-related matters

COMPENSATION

Employee will be paid at **rate of \$25.00-30.00 per hour** (based on experience) with the expectation of 3-5 hours of work to be completed each week. For any given month, there is no guarantee for a minimum of paid hours. Part-time work will be paid monthly (on the 20th of each month) based on the billable and non-billable hours for the prior month.

ADDITIONAL BENEFITS

- **Technology** required to perform the role of Navigator, such as Banister Advisor-owned laptops, mobile phones, or communication applications, may be paid for or subsidized by Banister Advisors, in Banister Advisor's sole and exclusive discretion.
- **Role-relevant training** may be paid for or subsidized by Banister Advisors, in Banister Advisors' sole and exclusive discretion.
- **Paid vacation, sick leave, and personal time off (PTO)** is offered to employees where applicable by laws. Paid PTO time is accrued for **Washington State employees** at a rate of one (1) hour for every forty (40) hours. Paid time off is paid to employees at the hourly rate defined in their employment agreement, and will adjust upon any formal changes to compensation that may occur. Accruals begin on the first day of employment. Paid time off cannot be capped and employees must accrue paid time off for all hours worked. Unused paid time off of 60 or fewer hours is carried over from one year to the following year for each employee. Banister Advisors provides each employee the opportunity to design their work schedule around the rest of their life. Each Employee will be encouraged to pursue vacation, work-life balance, and contributions to the community by working closely with the General Manager to plan for and schedule time off in consideration of personal and educational needed.

BANISTER ADVISOR SERVICES

Banister's in-house team, combined with an extensive expert network, offers a series of seamless health crisis and bereavement navigation services including, but not limited to:

DURING A HEALTH CRISIS | Full spectrum navigation for critical diagnoses and end-of-life transitions

- Concierge case management and logistics support for patients and families responding to life-limiting diagnosis, medical crisis, and/or other end-of-life circumstances
- Customized planning to reduce complexity and mitigate unnecessary costs before, during, and after intensive, palliative, and/or end-of-life care
- Timely delivery of appropriate communications to extended family, friends, and associates, developed in collaboration with patients and their loved ones

AFTER A LOSS | Personalized bereavement support for individuals and groups

- Partnership with hospice care/medical facilities to enable a peaceful, meaningful, and fully supported transition experience for family, friends, colleagues, and other close associates
- Coordination of travel logistics and hospitality management for out-of-town visitors
- Facilitation of post-hospice cleaning and home re-organization, including appropriate disposition of medicines, and medical equipment/supplies
- Planning and management of traditional events such as Wakes, Shiva, viewings, prayer groups, meals, and other immediate gatherings of family and friends
- Supervision of general household management services during periods of acute bereavement (meal service, tidying, laundry, errands, pet care, bill pay, etc.)
- Culturally sensitive referrals to spiritual care providers, clergy, licensed mental health professionals, and/or secular grief coaches

GRIEVING WITH OTHERS | Planning and supervision of funerary events

- Customized communications to inform extended family, friends, business associates, and the general community of the deceased's passing and to provide guidance on tribute opportunities
- Referrals to and liaison with funeral home directors, faith organizations, spiritual guides, and event space managers
- Guidance on event elements to honor the culture, unique personality, and desires of the deceased and close family
- Event planning and management of funerals and memorials (e.g., Celebration of Life)
- On-site advocacy for the wishes of the deceased and family to ensure sensitivity, compliance, and quality by all providers

CLOSING AN ESTATE | Estate processing and transition project management

- Full-service project management of all tasks required to process the estate and close probate (if required)
- Estate Processing Plan developed with clearly identified priorities, milestones, and dependencies
- Document organization and record search (e.g., medical billing/insurance, real property, finances, utilities, etc.)
- Assistance with optimizing account transitions with government agencies, banks, service providers and others
- Guided referrals to and liaison with exclusive healthcare, legal, and financial service professionals

MANAGING WHAT'S AHEAD | Future mapping for acutely-impacted survivors

- Supportive services to respectfully guide the survivors of loss as they adjust to various long-term impacts
- Guidance in developing detailed plans to address client priorities while optimizing for quality of life
- Facilitated decision-making and logistics support for household management plans, annual budgeting processes, real property and location strategy, and arrangements for daily living
- Referrals to and liaison with therapists, certified life coaches, clergy, non-denominational chaplains, and other longer-term supportive services professionals