

POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA The California Hope, Opportunity, Perseverance, and Empowerment (HOPE) for Children Trust Account Program					POSITION NUMBER (Agency-Unit-Class-Serial) 824-001-4870-900		Position ID 10653	
UNIT					CLASSIFICATION TITLE Student Assistant			
TIME BASE / TENURE Part Time/Intermittent		CBID E	WWG 2	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE		
LOCATION Sacramento					INCUMBENT		EFFECTIVE DATE	
STATE TREASURER'S OFFICE MISSION								
The State Treasurer's Office (STO) provides banking services for state government with goals to minimize banking costs and maximize yield on investments. The Treasurer is responsible for the custody of all monies and securities belonging to or held in trust by the state; investment of temporarily idle state and local government monies; administration of the sale of state bonds, their redemption and interest payments; and payment of warrants drawn by the State Controller and other state agencies.								
DIVISION OR BCA OVERVIEW								
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS The California Hope, Opportunity, Perseverance, and Empowerment (HOPE) for Children Trust Account Program, established through Assembly Bill 156 aims to close the racial wealth gap and confront the issue of intergenerational poverty by creating a new financial investment program specifically catered to vulnerable children throughout the state (HOPE Program).								
GENERAL STATEMENT								
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under direct supervision of the Supervisor II, the student assistant provides administrative, research, and outreach support for the implementation of new trust accounts and program expansion to foster youth and low-income children. The Student Assistant will assist with data management, document preparation, stakeholder communication, and compliance reporting.								
% of time performing duties		Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.						
40%		Assists with data management in the set up and maintenance of trust accounts to ensure compliance with department guidelines. Monitors and corrects any irregularities or notifies department staff.						
25%		Handles document preparation for use by HOPE analysts and management staff. Creates and maintains letters, memos and technical reports. Distributes program material for public outreach and sends general communication to account holders. Assists in drafting and organizing program materials for internal and external stakeholders.						
15%		Screens and directs incoming email and regular mail correspondence and phone calls. Greets and directs HOPE visitors to the appropriate personnel. Responds to stakeholders for general information inquiries or directs to analytical staff when necessary.						
15%		Facilitate quality assurance and compliance reporting by supporting staff in gathering, updating and verifying documents and records. Compiles information for analytical staff that is used in quarterly reports.						
5%		Performs other job-related duties as needed.						
SPECIAL REQUIREMENTS								
N/A								
To be reviewed and signed by the supervisor and employee:								
EMPLOYEE'S STATEMENT:								
<ul style="list-style-type: none"> I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT. 								
EMPLOYEE'S NAME (Print)					EMPLOYEE'S SIGNATURE		DATE	
SUPERVISOR'S STATEMENT:								
<ul style="list-style-type: none"> I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION. I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT. 								
SUPERVISOR'S NAME (Print)					SUPERVISOR'S SIGNATURE		DATE	

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