



## **FINANCIAL COACH**

### **Job Description**

#### **Purpose:**

The Financial Coach assists clients in developing plans of action to help reach their goals and achieve financial stability and further the household's economic status. Financial Coaches have the knowledge and capabilities to give education and assistance, guiding clients to take effective action toward increasing their financial wellbeing and fulfilling their financial goals.

The position is responsible for working with clients of diverse backgrounds (primarily low to moderate income), providing assessment and formulation of service plans, developing budgets, coordinating access to other services and resources, and maintaining documentation of services and outcomes.

#### **Supervision Received and Exercised:**

Receives general supervision from the Program Manager

#### **Essential Functions:**

Duties include but are not limited to, the following:

- Recruits candidates for enrollment and accepts referrals from within TCAA and from partner/subcontractor entities
- Thoroughly assesses clients' current financial situations to gain comprehensive understanding, identifies client needs and goals, and formulates individual service plans with clearly defined objectives and priorities
- Offers guidance, education, and accountability
- Coordinates referrals and access to other resources
- Conducts financial coaching through one-on-one, couple, or small group sessions
- Prepares for and conducts workshops for outreach and education
- Utilizes community agencies and resources to help clients stabilize and regain independence and support financial wellbeing
- Prepares and keeps current a case record on each client/household served
- Sets and maintains appropriate boundaries with clients; observes client confidentiality and PII protocols in client interaction and in the handling of documents
- Attends all relevant meetings, i.e. monthly staff meetings, social service meetings and other community meetings on an as needed/assigned
- Prepares statistical reports and complete a variety of reports
- Participates in program evaluation activities
- Collaborates with other TCAA staff and programs
- Demonstrates professionalism, compassion, and sensitivity in all interactions with clients
- Performs other duties as assigned

**Minimum Qualifications:**

- Knowledge of and sensitivity to the needs of diverse populations from backgrounds of disadvantage
- Has a clear understanding of how to ascertain clients' income, assets, debt, and credit scores
- A strong understanding of personal finances, particularly in the areas of budgeting, asset building, credit building.
- Ability to document results, conduct accurate measurements, and generate outcome reports
- Proven ability to assess a situation, consider alternatives and decide on an appropriate course of action
- Ability to empower and support clients in life choices and change
- Must have the necessary skill sets to empathize with clients about their financial situations while also providing motivation and moving clients toward positive action
- Prefer a working knowledge of family support and housing assistance resources
- Effective communication skills, both verbal and non-verbal, and excellent writing skills
- Bilingual (English/Spanish) preferred
- Computer literacy (Microsoft Windows and data management systems)
- Excellent customer service and time management skills

**Experience:**

- Requires a minimum one year of directly related experience
- Previous work experience in the financial sector (banking, lending, insurance, investments) is a plus
- Responsible work history indicating dependability, initiative, flexibility and ability to follow directions

**Education:**

- Bachelor's degree in related field
- Certified Financial Coach preferred

**License/Certifications:**

- Ability to obtain Level One Fingerprint Clearance Card
- Possess an Arizona Driver's License, current auto insurance, and a vehicle to use for work activities. Local travel is required.

**Benefits:**

TCAA is committed to providing a robust additional benefit package to complement compensation. This package includes paid holidays, vacation and sick time accrual that increases with tenure, medical, dental and vision insurance, life insurance, disability benefits, health savings account, and retirement. Additionally, TCAA pays 100% of the employee premium for the medical insurance plans.

**Status:**

Nonexempt, Full-time, M-F 8 AM to 5 PM, some evenings may be required