

**Purpose:**

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

The position is responsible for working with participants of diverse backgrounds (primarily low to moderate income), providing assessment and formulation of service plans, developing budgets, guiding resolution of credit issues and improvement to credit scores, 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 from within other TCAA programs
- Collaborate with Career Advisor/Case Manager to assess participant's financial situations to identify participant needs and goals, and formulate individual service plan 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
- Develops or expands on education and training materials used for individual and group financial education sessions
- Utilizes community agencies and resources to help participants stabilize and regain independence and support financial wellbeing
- Prepares and keeps current a case record on each participant/household served
- Sets and maintains appropriate boundaries with participants; observes confidentiality and PII protocols in participant interaction and in the handling of documents
- Assists participants with securing income supports such as SNAP benefits
- Attends all relevant meetings, i.e. monthly staff meetings, social service meetings and other community meetings on an as needed/assigned
- Prepares 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 participants
- 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 participants' income, assets, debt, and credit score



- 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
- Strong data analysis capabilities
- Proven ability to assess a situation, consider alternatives and decide on an appropriate course of action
- Ability to empower and support participants in life choices and change
- Must have the necessary skill sets to empathize with participants about their financial situations while also providing motivation and moving participants 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
- Requires at least one year of work experience in a training, coaching, or other advisory capacity in banking, lending, insurance, or investments and in corporate or nonprofit settings
- Responsible work history indicating dependability, initiative, flexibility and ability to follow directions

Education:

- Bachelor's degree in related field
- Certified Financial Coach preferred, or comparable work history

License/Certifications:

- Ability to obtain Level One Fingerprint Clearance Card upon hiring
- 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.

Compensation: \$18.00 - \$21 per hour

Status:

- Nonexempt, Full-time, Monday/Wed/Fri 8 AM to 5 PM. Tues/Thurs 9:30 AM to 6:30 PM, subject to variation and changes based on location

To apply, email a cover letter and current resume to: humanresources@tempeaction.org