**Job Description**
**Financial Coach**

## About Us

Neighborhood Trust Financial Partners' mission is to help workers build the financial security necessary for them and their families to thrive. The urgency of this objective has never been more obvious than now, as the nation struggles to deal with the COVID-19 pandemic, and with the tremendous economic strain that has accompanied it. This crisis has laid bare the highly vulnerable financial state of low-wage workers, even as it has underscored American society's total dependence on these individuals to sustain our economy, health, community, and culture. With over two decades of experience, Neighborhood Trust is well prepared to meet this moment, and to advocate for our clients as political and corporate interests respond to this historic wake-up call.

TrustPlus is a financial wellness benefit that blends human connection with action-oriented tools and products tailored to workers, with diverse customers including employers, benefits providers, fintechs, labor organizations and worker networks. TrustPlus is one of the key avenues through which Neighborhood Trust is scaling its best-in-class financial coaching nationally. Today we serve nearly 10,000 workers each year. TrustPlus is growing quickly with strong support from leading foundations and strategic partners to expand our national reach. We are hiring Financial Coaches to meet this growing need.

## Position Details

Financial Coaches assess clients' financial health through one-on-one coaching and then develop a tailored set of recommendations to help clients improve their financial position and pursue their goals. Our TrustPlus program allows us to serve clients across geographies via phone sessions or video conferencing. We leverage multiple communication channels – phone, SMS, email - to engage our clients and provide follow-up services. In addition to individualized coaching sessions, some Financial Coaches may also deliver financial capability courses for groups. Financial Coaches require excellent judgement and must exercise professional discretion to accurately assess each client's unique situation and effectively develop personalized plans of action. These plans include concrete recommendations for debt reduction, credit improvement, money management, use of financial services, asset protection and the pursuit of short- and long-term goals. The services offered by Financial Coaches are scheduled to meet the needs of our clients. As such, schedules regularly include evenings, early mornings and weekends.

## Principal Responsibilities

As part of an innovative and dynamic organization, the position is actively evolving and responsibilities change as services are refined and new partnerships develop. The following are responsibilities assigned to Financial Coaches depending on details of work assignment.

- Work directly with clients to provide high-quality financial coaching via individualized counseling
- Provide ongoing support and continue to actively engage clients to promote financial health
- Document services and gather session data for program reporting and evaluation
- Achieve program goals for client impact and service outputs, taking initiative with client outreach

- Deliver presentations on personal finance topics and our services
- Participate in regular team meetings and continued skill-building training sessions
- Research financial products, consumer rights, and resources on an ongoing basis
  - Due to the breadth of personal financial topics, the evolving nature of consumer protections and the shifting landscape of financial products and consumer resources, Financial Coaches are responsible for ownership of their ongoing learning and skill development
- Represent Neighborhood Trust in media inquiries, at events within the field, and with peer organizations

## Qualifications

Required Qualifications:

- Two years of full time work experience in personal finance, education, social services, community organizing or a related field.
- Specialized knowledge in financial empowerment services to low and moderate income individuals.
  - Applicants without prior knowledge but who have professional or comparable experience about personal finances (money management, savings, financial services, consumer rights) may be considered for the position but must complete Neighborhood Trust's Financial Empowerment Training course upon hire and successfully pass all exams in order to serve in position.

Required Skills and Attributes:

- Self-motivated - able to work independently, meet deadlines without supervision and take ownership of personal finance research and continued learning
- Excellent communication and interpersonal skills; ideally coaching and facilitation skills with adults or in non-traditional settings
- Ability to exercise knowledge-based professional judgement and discretion to adapt services as needed
- Strong attention to detail
- Robust critical thinking skills
- Ability to effectively receive and implement feedback
- Bilingual strongly preferred – ideally in Spanish/English

## COMPENSATION

Competitive salary and benefits package offered.

## TO APPLY

Please send resume and cover letter to hr@neighborhoodtrust.org with the subject line **"Financial Coach"**.

Neighborhood Trust is committed to a workplace culture of collaboration and respect. We are dedicated to ongoing professional development for our employees, supporting career growth and opportunities for advancement within the organization. Neighborhood Trust is an equal opportunity employer and we are committed to equal employment opportunity in all decisions related to employment, promotion, wages, benefits and all other privileges, terms and conditions of employment.