



<b>POSITION:</b> Financial Coach	<b>REPORTS TO:</b> Program Manager
<b>CLASSIFICATION:</b> Full Time – Non Exempt	<b>DEPARTMENT:</b> Economic Empowerment

**PRIMARY RESPONSIBILITIES:**

The Financial Coach is responsible for assisting clients in developing plans of action that are intended to help the client reach their goals and achieve financial stability. The Financial Coach conducts individualized one-on-one session and group workshops on topics such as budgeting, credit building, and banking products.

**ESSENTIAL JOB REQUIREMENTS:**

Duties and responsibilities include, but are not limited to the following areas:

- Assess client needs via financial health assessment and develop individual action plans with each client
- Make appropriate referrals and integrate other wrap-around supports (i.e. benefits, tax preparation) into sessions to achieve greater results.
- Performs on-going case management to provide service and problem-solving assistance.
- Conducts group education workshops at least once a month in accordance with U.S. HUD standards.
- Work a minimum of one Saturday a month
- Performs outreach activities on behalf of Centro Campesino Farmworker Center, Inc. (CCFC).
- Maintains detailed, up-to-date, and accurate client files (hard and electronic) utilizing required data management software.
- Meet all program outcome goals.
- Perform all other miscellaneous responsibilities, special projects and duties as assigned.

**JOB EXPERIENCE AND EDUCATIONAL REQUIREMENTS:**

The ideal candidate will have demonstrated skills, strong knowledge and experience in the following areas:

- Working experience with any aspect of the financial services: banking, insurance, wealth building, etc.
- Case management
- Computer proficiency and the ability to learn new software and computer systems
- Public speaking and communication skills (written and verbal)
- Ability to manage multiple tasks in a high volume work environment
- Ability to work with people of diverse backgrounds
- Bilingual: English and Spanish– proficiency is required
- Experience and/or certification as a housing counselor or financial educator is a plus
- Minimum Associate Degree from accredited college, BA preferred

**COMPESATION:**

This is a full-time (40 hours per week), non-exempt position. Starting salary is contingent on experience and education. Benefits include: company paid health-insurance, long-term disability insurance, life-insurance, annual leave and sick leave, low-cost employee-paid dental & vision plan, employer contribution to a 403-B retirement plan is offered after one year of employment.

Please send **cover letter and resume** to Alicia Moreno at [amoreno@ccfcfl.org](mailto:amoreno@ccfcfl.org). Any submission without both items will not be accepted. No phone inquiries will be accepted. CCFC is an Equal Opportunity Employer.