OPPORTUNITY ADVANCEMENT INNOVATION
in WORKFORCE DEVELOPMENT
www.oaiinc.org

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JOB DESCRIPTION

Position Title: Financial Coach
Position Category: Non-exempt
Department: Pre-employment Education and Training
Reports to: Program Manager, PEET

Job Summary:
The Financial Coach primarily works to provide financial counseling and coaching. The financial coach has a strong understanding of personal finances and the ability to teach that knowledge to others. They are responsible for assisting program participants in developing plans of action to help the client reach their goals and achieve financial stability. The coach will also conduct classes and workshops on topics such as budgeting, credit building, and banking products. The financial coach will provide overall retention services and works closely with the Student Support Specialist.

Responsibilities:
- Provide individual financial counseling/coaching to program participants and complete detailed financial assessments. Develop plans of actions and provide tools, resources, and accountability to the client to help them meet their goals.
- Assist program participants in resolving current financial situations, while providing a wide lens on their financial health to shift the approach to proactive financial management.
- Work with participants to create a budget and provide strategies for budget improvements.
- Access participants' credit report/scores and provide individual strategies for credit building.
- Develop plans of actions and provide tools, resources, and accountability to the client to help them meet their goals.
- Maintain contact with graduates via meetings, calls, emails and social media to document progress toward goals and assist with retention services and data collection.
- Conduct financial workshops as a means of outreach and education.
- Develop workshop materials or tailor existing materials to meet the specific needs of OAI's clients. Workshops may include topics such as: budgeting, savings, banking products, credit building, and identity theft.
- Create a network of referral organizations to help you assist the client meet his/her financial goals.
- Other duties as assigned.

Required Qualifications:

- Four-year college degree in financial services or a related field preferred - equivalent work experience will be considered.
- Must possess the content knowledge required to give clients high-quality and timely financial education, particularly in the areas of budgeting, asset building, and credit building.

- Previous work experience in the financial sector (banking, lending, insurance, investments) is a plus
- Community outreach and case management experience in non-profit strongly preferred.
- Motivated, self-directed, and conscientious of various roles and responsibilities
- Ability to communicate ideas, advice, feedback and critiques professionally and concisely in individual and group settings
- Proficiency in MS Office including Word, Excel, and PowerPoint. Experience with Salesforce data management system or similar client based platform a plus.
- Bilingual Spanish-English is a plus.