

OAI JOB OPENING

Position Title: Financial Coach
Position Category: *(Full time, non-exempt)*
Department: OAI Chicago Southland
Location: 208 Forest Blvd, Park Forest, IL
Flexible Hybrid: work from home/Chicago Southland office/in community
Reports to: Program Manager, OCS
Oversees: n/a
Salary: \$45-50K per year

Who Are We?

As a premier workforce education, training, and development organization, OAI's mission is pretty simple: to improve lives. We do that through offering training that leads to safe, meaningful employment while helping companies and communities to thrive. Our commitment to Diversity, Racial Equity and Inclusion means you will be joining a very diverse and dynamic team of professionals who are enthusiastically dedicated to our mission. Big thinkers, strategists, problem solvers, caring fun-lovers ... OAI is a place that encourages innovative thinking and values flexibility and work-life balance. Our hard-working team is supportive and collaborative and all share a common desire to help our fellow citizens live better, safer lives. We're a growing non-profit and we're looking for people to grow with us!

Who Are You?

You're a relationship builder, mentor, and networker. You love working with other people and making connects to help others thrive. You are committed to community growth and being part of that change. If this is you, we need you to join our team!

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.

Why OAI?

Remember when we said at the top that we value work-life balance? That's legit; OAI's pay and benefits are generous! Benefits include:

- BCBS medical and dental insurance
- VSP vision
- Short- and long-term disability insurance
- Professional development opportunities
- Seven paid holidays plus we are closed between Christmas Eve and New Year's Day
- Hybrid office setting
- Paid time off
- Weekly mental health time off
- Monthly Internet/phone reimbursement

- 401k Plan with match
- Excellent technology and IT support
- Employee Assistance Network
- DREI Committee

OAI provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, sexual orientation, gender identity, disability or genetics.

How To Apply?

To apply, submit cover letter describing your interest and experience along with your resume to oihr@oaiinc.org

Key areas of responsibility:

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.
- Regularly 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.
- Maintain regular contact with graduates via in-person meetings, calls, emails and social media. Document progress toward financial goals and assist with retention services.
- Maintain a network of referral organizations to assist the client meet his/her financial goals.
- Perform extensive data entry in internal and external data management systems.
- Provide regular performance reporting and assist with required funder reporting.
- Attended funder meetings, workshops, professional development, and conferences as needed
- Work closely with entire OCS team to assist with overall program success and positive client outcomes.
- 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.
- Must have automotive transportation for reimbursable local job-related travel. Valid driver's license and auto insurance required
- Hybrid office position with high level of direct one-on-one client meetings.

Equal Opportunity:

Diverse candidates are encouraged to apply.