New Economics for Women®

FINANCIAL COACH

Reports to: Program Manager	**Pay:** $45,000 -$60,000 (100% FTE) $21.64 - $28.85 per hour	**Employees to be supervised:** N/A **Status:** Salary - Non-Exempt
Location: Van Nuys, CA or/and Canoga Park, CA		**Work Hours:** 40 hours per week; Monday-Friday some evenings and weekends required

At NEW, we believe that Poverty is a monster destroying hope and prosperity in the lives of low income communities and their families. Using NEW's transformative approach we connect people, communities, and families to their own sense of power and economic mobility. We implement a holistic approach in all we do by addressing families' basic needs, such as finding a stable and safe place to live, to supporting ambitious plans such as purchasing a home or starting a business.

At NEW we respect and honor all families, communities and cultures. We encourage innovation and "thinking outside the box". We expect all employees to connect, create, and celebrate by being authentic, bold, engaged and transformational.

Position Summary:

The Financial Coach will serve as the expert in financial education. Conduct financial literacy workshops to all adults and youth serviced through the FamilySouce Center, conduct 1 on 1 coaching customized to each family (long, medium, short planning). The Financial Coach will link families/individuals to financial empowerment activities (IDA, America Saves, Cash 4 College, etc...) Coordinate VITA, create relationships with banks and other financial institutions. Promote active participation in achievement of identified goals through authentic and encouraging relationships. All FSC-staff must understand the FSC program purpose, vision and objectives, be knowledgeable of services and resources, and engage in the following activities: outreach, intake/assessments, referrals, and customer follow up.

Duties and Responsibilities:

Financial Case Management

- Apply a holistic, strength-based approach to working with individuals and families
- Conduct comprehensive assessments, goal-oriented service plans, and case notes for each participant
- Actively engage participants in meaningful, goal-oriented, and supportive meetings at least twice per month
- Conduct weekly Financial Literacy Workshops
- Develop and manage a family savings asset building plan
- Work with families to improve credit score
- Assist families with managing their Individual Development Account (IDA)
- Introduce and encourage families to open College Savings Accounts (529) and Individual Retirement Accounts (IRA)
- Establish and sustain working relationships with local financial institutions
- Develop, coordinate, and facilitate programs and activities that will assist customers in achieving their goals
- Conduct outreach, follow-up, and caseload management

General Customer Support:

- Help to create and maintain a welcoming, orderly, and neat environment
- Greet and assist individuals with exceptional customer service
- Assist with general customer applications and referrals
- Ensure customer file contains complete and updated information to include, but not limited, assessments, referrals, services, and case notes

- Maintain a working knowledge of in-house and community resources
- Other responsibilities as delegated by Center Manager

Qualifications and Experience:

- Bachelor's Degree in Finance, Economics or related field
- Minimum two (2) years of experience in financial industry.
- Preferred: social experience and work in the nonprofit sector, experience VITA coordination or tax preparation, invested in community being served
- Trustworthy, cannot impose/steer to specific financial institution.
- Motivator, great public speaking and communication skills, ability to network, credit worthiness
- Possess thorough knowledge of laws, regulations and guidelines related to confidentiality
- Excellent verbal and written communication skills
- Excellent and effective public speaking and presentation skills
- Ability to coordinate multiple assignments and prioritize
- Ability to handle sensitive and confidential issues in a professional manner
- Ability to manage crisis situations
- Ability to work independently as well as in a collaborative
- Residency in and /or familiarity with the target area and its cultural diversity
- Excellent knowledge of word processing tools and spreadsheets (MS office word, excel, access, etc…)
- Working knowledge of office equipment and computer hardware and peripheral devices
- Detail-oriented.

Additional Requirements:

- Must have a valid California Driver's License, Liability Insurance, and an automobile in good working condition
- Fingerprinting and TB Clearance
- CPR/First Aid Certification is a plus
- Flexible with working hours, including evenings and weekends
- Fluent in Spanish
- Able to Facilitate in Spanish and English

Apply via **e-mail** or **website only**

Submit your resume with a cover letter:
Via Website: https://neweconomicsforwomen.org/our-job-openings/
Via E-mail to hr@neworg.us
(Please ensure to include the position you are applying for on the subject of your e-mail)

For additional information you may contact Human Resources:
303 S Loma Drive, Los Angeles, CA 90017 | (213) 483-2060 Ext-311
E-mail hr@neworg.us

Stay Connected:

Learn more about us at: www.neweconomicsforwomen.org

New Economics for Women (NEW) creates economic and educational opportunities for single parents, families and disinvested communities as a pathway for dreams to come true.

EQUAL OPPORTUNITY EMPLOYER