Job Title: Financial Coach

Employer/ Agency: The Women’s Resource

Job Description: The YourLife Financial Coach is essential to the success of the organization and provides one-on-one financial coaching to women who have taken YourLife Finance Classes, participated in YourLife Possibility Groups or selfselect into the program.

Responsibilities:
- Contact potential clients who have expressed interest in one-on-one coaching
- Support and maintain coaching relationship with clients exiting YourLife Possibility Groups
- Coordinate one-on-one coaching schedule
- Assist clients with goal setting, budgeting, credit building/repair, debt repayment, savings
- Empower the client through client-directed coaching
- Provide introduction or linkage to relevant community resources and/or financial products
- Encourage clients as they work toward established financial goals
- Monitor client’s progress toward goal completion
- Follow up with clients at regular intervals
- Utilize coaching forms during coaching sessions to empower the client and record progress
- Collect required documentation and ensure data is complete
- Record data in Salesforce database and use to inform practice
- Assist in program report preparation and analysis
- Conduct financial education classes as a means of outreach and education
- Report to and work closely with the Senior Program Director
- Engage in continuous quality improvement, learning and training
- Ensure coaching is delivered in a high-quality manner
- Ensure annual program goals and objectives are met
- Ensure safety and confidentiality standards are met

Qualifications:
- Bachelor degree required
- Bilingual (English/Spanish) preferred, not required
- Must have reliable transportation
- Ability to work in a remote environment
- Ability to effectively organize and manage time
- Passion to help others help themselves
- Self-directed, independent worker who takes initiative and is able to solve problems
- Attention to detail and ability to respond to deadlines on time
- Excellent organizational, verbal, written and interpersonal communication skills
- Professional that works with poise, confidence and team-oriented approach
- Understanding of how financial education/coaching affects an individual
- Flexible and positive attitude, sense of humor, patience, character and integrity
- Non-profit experience or demonstrated thorough understanding of the field
- Advanced proficiency in Microsoft Office products (Outlook, Word, Excel)
The ideal candidate will have experience in two or more of the following:
- Financial coaching
- Financial education and/or asset building
- Strong understanding of personal finance (specifically around budgeting, asset building and credit building)
- Experience working with clients toward goals that require behavior change
- Experience working with low to moderate income individuals

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<thead>
<tr>
<th>Salary/Hours</th>
<th>Full-time Position: Competitive/commensurate with experience and other qualifications</th>
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<tbody>
<tr>
<td>Employer/Agency</td>
<td>YourLife Finance Program, The Women’s Resource</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>Houston, TX</td>
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<tr>
<td>Contact Person</td>
<td>Kelly Keith</td>
</tr>
<tr>
<td>Contact Title</td>
<td>Senior Program Director</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>No phone calls or email inquiries please</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:kkeith@thewomensresource.org">kkeith@thewomensresource.org</a></td>
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<tr>
<td>Application Method</td>
<td>All candidates are asked to EMAIL the three documents listed below to <a href="mailto:kkeith@thewomensresource.org">kkeith@thewomensresource.org</a>. Documents should be addressed to: Kelly Keith, Senior Program Director. 1. Cover letter stating how your skills are a match for the position requirements and duties 2. Resume 3. Writing sample that addresses the following scenario. (100-250 words per email, 12 point font) Scenario: Write an email to a YourLife Coaching client. Only qualified applicants that submit ALL documents requested above will be considered.</td>
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<tr>
<td>Opening Date</td>
<td>Immediate. The position will remain open until filled.</td>
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To post a job opportunity or if your response to this job posting results in successful employment, please email the GCSW Office of Alumni and Career Services at mswjobs@central.uh.edu with the hiring details of your new job opportunity. Thank you.