

Job Title	Financial Coach- United Way Center in Waller County
Employer/ Agency	Wesley Community Center
Job Description	<p>Position Description: The Financial Coach provides consultation, including financial counseling and coaching to assist individuals toward achieving financial stability. This position will work with clients to assess their current financial situation and develop individualized plans of action to help them meet their goals. The primary goal of the financial coach is to educate and help clients to navigate a path toward personal financial freedom.</p> <p>Hours: Monday, Wednesdays and Friday: 8am to 5pm Tuesday and Thursdays: 11am to 8pm One day a month on Saturday 8:30am to 12:30pm Every two weeks, spend one day at Wesley Community Center for supervision and administration.</p> <hr/> <p>Essential Functions:</p> <ul style="list-style-type: none"> • Provide direct client consultation to increase understanding of personal financial situation • Complete individualized financial assessments utilizing personal budgeting tools and credit report to assist clients in resolving negative outstanding financial situations • Develop plans of action and provide appropriate support to help client meet financial goals • Conduct financial education workshops to assist clients toward making appropriate financial decisions • Work with other United Way THRIVE Center team members to ensure client needs are being met • Utilize database system to input and monitor client progress through tracking of personal goals and objectives • Analyze changes in client financial portfolio and provide appropriate consultation • Develop relationships with local financial institutions and community organizations to support enhancement of program services and provision of appropriate financial products to THRIVE/FOC clients • Monitor case files for completeness, required documentation, and consistency <p>Additional Responsibilities</p> <ul style="list-style-type: none"> • Represent United Way THRIVE/FOC in financial literacy workgroups/taskforce(s) • Facilitate customized financial education workshops for non-traditional clientele such as youth • Able to support through word and action the Wesley Community Center's Mission statement and the mission's core values of integrity, excellence and commitment through completion of other duties as needed and assigned
Qualifications	<p>Knowledge, Skills, and Abilities:</p> <p>Ability to write and speak clearly and informatively; Bilingual, English and Spanish-speaking preferred; this position requires well-developed understanding of personal finance, banking systems, and credit building strategies; ability to translate financial complexities in a relatable manner to clients of various backgrounds; understanding of financial coaching best practices; previous work experience with the target population, and/or the ability to provide coaching</p>

	<p>services in a culturally sensitive manner; ability to analyze complex financial situation and develop plans of action to resolve the problem; strong computer skills including typing and Microsoft Office; Customer service oriented and able to effectively manage difficult or emotional client situations; Ability to work cooperatively and support the team's effort to succeed; Ability to interpret and communicate contractual mandates and guidelines, as well as learn, with a strong attention to detail; Strong organizational and project management skills including planning and scheduling; Understanding of effective case management strategies and client support resources; While in this position, the employee is expected to seek to understand, communicate appropriately and effectively, build a positive, professional rapport with all clients and staff using active listening and conflict resolution skills.</p> <p>Education & Experience: Certified Credit Counselor with the National Association of Certified Credit Counselors or ability to acquire within 6th months of hire required, Bachelor Degree in Business, Finance or related field preferred and/or meets experience criteria; a minimum of (3) years' work experience working with financial assistance programs.</p>
Salary/Hours	43,000.00 /40hrs. week
Employer/Agency	Wesley Community Center
Address	1410 Lee St.
City, State, Zip	Houston, TX, 77009
Contact Person	Crystal Dozal
Contact Title	Community and Personnel Generalist
Telephone Number	(713) 821-8907
Fax Number	
Email Address	cdozal@wesleyhousehouston.org
Application Method	https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=67252b91-fb35-445c-bc55-28d3f1bc4018&ccId=19000101_000001&jobId=292212&source=CC3&lang=en_US
Opening Date	

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