

FOC FINANCIAL COACH JOB DESCRIPTION

United Way of Central Jersey is seeking a Financial Coach for our newly established Financial Opportunity Center (FOC), which will be located in Perth Amboy and service surrounding areas in Middlesex County.

FOCs help low- and moderate- income families attain financial security by offering an integrated bundle of services in three areas: employment and career coaching; financial coaching; and income supports coaching. The Financial coach will work as part of this cross-functional team and will report to the FOC's Project Director. Candidates are encouraged to learn about FOCs and the Local Initiatives Support Corporation that supports FOCs nationwide at www.lisc.org.

Position Description/Key Duties

We seek a person who can provide clients with the tools to undertake long-range financial planning by conducting one-on-one counseling and workshops about topics such as budgeting, saving, credit building, credit repair, banking products, and "smart" debt. Major responsibilities include:

Financial Coaching, including one-to-one counseling to assess the client's financial situation and develop goals and an action plan to meet those goals; and facilitating workshops for clients and the community that cover financial topics relevant to low- and moderate-income consumers. Coaches will establish long-term relationships with clients to help them achieve their goals.

Financial Institution Relationship-Building, including developing relationships with local mainstream financial institutions and other organizations that can assist clients in reaching their financial goals.

The Financial Coach will track client progress and outcomes using LISC/FOC software, and will work closely with the FOC team to ensure that clients receive comprehensive, cohesive service.

Experience and Qualifications

- Fluency in Spanish is required
- Relevant Bachelor's Degree, experience in the financial sector, and a solid understanding of personal finance principles
- Experience in community outreach and counseling the FOC's target population
- Ability to work a flexible schedule that may include evenings and weekends
- Communication skills and cultural competency to work with a variety of stakeholders
- A valid driver's license, reliable transportation and documentation of vehicle liability insurance

This is a full-time position. Salary will depend on experience. We offer a comprehensive benefits package. To apply, please send your resume to dcaller@uwcj.org.

