



Financial Wellbeing Coach, Small Business

DEPARTMENT: HOPE Program Office of Operations

ACCOUNTABILITY: Reports to President and Area Vice President

JOB SUMMARY

For the past twenty-four years Operation HOPE has been dedicated to empowering underserved communities through financial literacy. Now, our work encompasses much more than financial education. Our work is about instilling knowledge and confidence in those we serve so they can experience, sometimes for the first time in their lives, financial dignity.

DUTIES AND RESPONSIBILITIES

- Build and maintain client bases, keeping current client plans up-to-date and recruiting new clients on an ongoing basis
- Help clients build a debt reduction action plan
- Guide clients in the gathering of information such as bank account records, and business tax returns
- Prepare and interpret client's information such financial document summaries, and income projections
- Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives
- Answer clients' questions about the purposes and details of financial plans and strategies
- Community outreach and marketing execution
- Enter clients data into the CRM system
- Coach individuals by phone and in-person
- Schedule and facilitate workshops on financial literacy topics
- Build and maintain community alliances
- Relationship management

REQUIRED SKILLS AND EDUCATION

- Bachelor's degree is preferred, however will consider comparable 2+ years work experience in the financial industry
- Presentation Skills: the right candidate has the ability to conduct group and individual recruitment and training sessions for volunteers
- Multitask Oriented – the right candidate has the ability to begin, manage and complete several projects and program relationships simultaneously

- Proficiency in MS Word, Excel and PowerPoint will be required in this position
- Professional demeanor and attire will be required
- Access to personal transportation that will allow them to travel within the designated market
- High-energy individual who demonstrates confidence, accountability, and professionalism as a leader with each interaction while demonstrating personal integrity, resilience, and respect for others
- Ability to deliver client education and training by developing the appropriate awareness of financial product offerings
- Demonstrate knowledge in fiduciary responsibilities and procedures when describing financial products services to clients
- Requires an average of 50% business travel

EEO STATEMENT

Operation HOPE is an Equal Opportunity Employer, all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, age, national origin, protected veteran status, disability status, sexual orientation, gender identity or expression, marital status, genetic information or any other characteristic protected by law.

HOW TO APPLY

Please visit our website at: www.OperationHOPE.org and click on Careers.