



Financial Wellbeing Coach, Credit & Small Business (Spanish Speaking)

DEPARTMENT: HOPE Inside Retail Network

ACCOUNTABILITY: Reports to a Regional Vice President

For the past twenty-five 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.

JOB SUMMARY

In this role you will coach in a manner that encourages measurable, positive outcomes in client development. You will serve as the primary point of contact addressing internal and external client interactions at the HOPE Inside with business partners and senior leadership levels. You will be based out of a HOPE Inside office (predominately hosted by a corporate partner).

DUTIES AND RESPONSIBILITIES

- Conduct client and consultant interactions using Strategic Client Management methodologies and tools
- Recruit, build and lead clients in order to achieve strategic performance objectives and help clients build a debt reduction action plan
- Build productive relationships with Bank Partners for shared Client relationships
- 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
- Promote Operation HOPE, Inc. solutions via social media
- Schedule and facilitate workshops on financial literacy topics i.e. credit, money management
- Coach individuals by phone and in-person
- Liaison with partner and the community
- Coordinate and schedule coaching sessions
- Schedule workshops in the bank and the community
- Maintain client data for impact reporting into the CRM system
- Build and maintain community alliances and execute marketing objectives
- Help clients build a debt reduction action plan

REQUIRED SKILLS AND EDUCATION

- Bachelor's degree is preferred, however will consider comparable 2+ years work experience in the financial industry
- Must possess strategic thinking expertise as well as the ability to plan and execute tactical strategies to implement company objectives
- Must be savvy at internal and external communication techniques and messages
- Strong contributor with analytical skills and the ability to identify and proactively communicate industry and governance trends to clients.
- Strong presentation skills with the ability to conduct group and individual recruitment and training sessions for volunteers and schools
- Highly experienced Financial Coach with outstanding people skills and ability to quickly form meaningful working partnerships
- Good listener and self-starter with a demonstrated ability to work with minimal hands-on direction
- Strong communication skills both verbally and in writing to conduct presentations and meetings
- Expertise to effectively develop and influence others
- Experience managing a volunteer program with recruiting and training
- Multitask oriented with the ability to initiate, manage and maintain several projects and program relationships simultaneously
- Basic computer literacy a must. Proficiency in MS Word, Excel and PowerPoint.
- Professional demeanor and attire will be required in this position
- High-energy individual who demonstrates confidence, accountability, and professionalism while demonstrating personal integrity, resilience, and respect for others
- Ability to deliver client education and training by developing appropriate awareness of investment offerings, fiduciary responsibilities and procedures when presenting opportunities for clients to contract investment products, services and platforms
- Demonstrate knowledge in fiduciary responsibilities and procedures when describing financial product services to clients
- This job requires personal transportation that will allow travel within the designated market area
- Requires an average of 25% business travel

PREFERRED SKILLS

- Execution of information across various social media channels
- Experience using Customer Relationship Management programs
- Knowledge of interpreting Credit Report information
- Experience building and maintaining financial budgets

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.