



## Financial Wellbeing Coach, Homeownership

**DEPARTMENT:** HOPE Inside Retail Network

**ACCOUNTABILITY:** Reports to a Regional Vice President

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.

### **JOB SUMMARY**

Provide one-on-one counseling and group education on the home buying process and assist individuals to improve their financial profile in order to qualify for a mortgage loan. Identify, recruit, educate, counsel potential and existing homeowners.

### **DUTIES AND RESPONSIBILITIES**

Primary duties and responsibilities include but are not limited to the following:

- Coordinate and conduct home buyer workshops and classes
- Enroll and counsel potential homeowners in the Case Management counseling program
- Provide homeownership counseling by providing one-on-one credit, debt and savings counseling to individuals for the purpose of qualifying for a home loan
- Conduct follow up appointments to successfully assist individuals in completing the program
- Input, track, and update clients in Client Management System
- Maintain program client files
- Prepare credit bureau dispute letters and settlement letters for program clients (when applicable)
- Provide down payment assistance counseling for homeownership counseling participants (when applicable)
- Enroll, track the progress, and follow-up with program clients and clients participating in the HOPE Fund Matching Grant (when applicable)
- Community outreach and business development

- Recruit for and promote HOPE programs and services
- Maintain a neat clean work area
- Establish referral relationships and additional funding opportunities
- Ensure that all program goals, standards and policies are met
- Complete production and activity reports
- Meet production goals
- Facilitate the lending process
- Facilitate realtor and lender partner relationships
- Ability to articulate the mission, objectives and programs of the organization
- Perform all other miscellaneous responsibilities and duties as assigned

## **REQUIRED SKILLS AND EDUCATION**

- Bachelor's degree is preferred, however will consider comparable 2+ years work experience in the financial industry
- Housing counseling, financial planning and credit counseling experience
- 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: minimum 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
- This job requires personal transportation that will allow travel within the designated market area
- Requires an average of 50% business travel

## **PREFERRED SKILLS**

- Experience in loan packaging and counseling is preferred
- Experience in outside sales and outreach preferred

## **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](http://www.OperationHOPE.org) and click on Careers.