

Prosperity Connection Position Description

Position Title: Financial Coach

Status: Non-Exempt

Position reports to: Director of Coaching

Position supervised: None

Job Summary:

The Financial Coach serves as an apprentice in financial coaching and mentee to Senior Financial Coaches. The primary responsibility of the Financial Coach is to provide one-on-one financial coaching services in conjunction with the Senior Financial Coaches and to help with coaching and program deliverables.

Evenings and weekends may be required on an as-needed basis, to fulfill community outreach and client commitments.

Essential Functions:

- **Financial coaching:** Assist with providing credit counseling and one-on-one financial coaching with the goal of encouraging and promoting positive financial behaviors and outcomes. Along with Senior Financial Coaches, will help clients establish goals, develop action plans, and track successes.
- **Data collection and management:** Support the timely documentation of sessions and input of client data into the Salesforce data management platform. Work cooperatively with the Director of Coaching to guarantee accurate reporting.
- **Client outreach:** Maintain touch points with clients during the coaching process to ensure continuity and progress towards goals. Ensure client satisfaction as a priority of Prosperity Connection financial coaching.
- **Professional development and training:** Build financial empowerment experience through client interaction and Senior Financial Coach support. Participate in Prosperity Connection's skill-building training programs that are personally selected in partnership with the Director of Coaching.
- **General program support:** Other duties may include staffing outreach events, teaching financial education classes in support of the St. Louis Builds Credit initiative, and assessing incoming clients to determine scope of services needed.
- **Compliance:** Adheres to all guidelines related to confidentiality. Understands and complies with all state and federal regulations and laws. Ensures compliance with all governing regulations.

- **Community and Partner involvement:** work with local organizations that serve the Spanish-speaking community; specific partnerships to be determined upon hire.

Preferred Experience and Qualifications:

- Bi-lingual, Spanish speaking.
- Willingness to participate in a three-year apprenticeship.
- Desire to understand community development, project management, and organizational dynamics.
- Enthusiasm for serving others and the community is a must.
- Willing to establish rapport and interact confidently and effectively with diverse individuals on all social and economic levels.
- Flexible, adaptive, and positive in a dynamic and changing environment.
- Ability to effectively receive and implement feedback.
- Superior written and verbal communication skills, exceptional attention to detail, and must be able to master the use of Microsoft Office applications (Word, Excel, Teams, Outlook, SharePoint, OneDrive). Experience in Salesforce is a plus, but not required.
- Candidate should show initiative, be willing to work a flexible schedule, and have the ability to work independently or in a team environment.

To apply for the opportunity, please send resume and cover letter to Robert Nelson V at employment@prosperityconnection.org

Physical Requirements:

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The physical requirements of this job include the ability to stand/sit, walk, reach above shoulder level, data entry, crouch, bend, stoop, kneel, squat, crawl and carry/lift up to 35 pounds. The employee must have a valid driver's license and have his or her own personal transportation.

Salary Range: \$55,000 - \$65,000