



Senior Financial Coach – Part-Time

Reports To: Regional Project Director, Milwaukee
FLSA: Exempt

Education • Lending • Coaching
Entrepreneurship
Financial Impact

The Senior Financial Coach is responsible for coordinating WWBIC's Financial Capability programming and working individually with program clients. This is a part-time position (28 hours)

ESSENTIAL JOB FUNCTIONS: *

- Lead the respective financial capability programs to achieve or exceed annual program goals and objectives, including enrollment, successful case and account management, evaluation, process improvement, and new product implementation. Assist program participants using various communication methods (face to face, phone and email counseling) and appropriate technology. Develop strategies to encourage successful participation within the financial capability programs. Monitor progress of clients' financial development plans. Meet with clients in person as directed by program and client need, communicating at minimum on a monthly basis via email, mail, phone, or in person.
- Maintain and ensure proper file documentation, electronic and hard copy file, as instructed through appropriate funding guidelines including accurate and timely case management notes and documentation of communications. Track counseling hours and input them regularly into Database.
- Assist Clients in opening/maintaining/closing their IDA/Match Savings Accounts. Work with Clients on Asset Purchase.
- Coordinate Monthly statements correspondence to Match Savings Account clients.
- Lead the completion of all required Financial Capability funder reports and ensure recordkeeping is timely and accurate. Provide leadership with program materials, status and outcomes as requested. Meet or exceed required program goals and outcomes.
- Conduct and/or facilitate financial capability programming and other WWBIC sessions as needed. Provide assistance to the education group in scheduling classes, recruiting volunteers/speakers, and securing classroom locations. Plan and coordinate all aspects of financial capability programming including outreach, orientation, workshop and graduation requirements as instructed.
- Work with Marketing to get event photos and flyers and postcards to promote Financial Wellness, trainings, Make Your Money Talk Bootcamps (MYMT) and Match Savings Orientations.
- Coordinate and implement regular financial capability client efforts while cross-promoting relevant WWBIC programming. Maintain good relationships with contract partners and bank partners in conjunction with programs and services staff. Attend partner's meetings to

promote upcoming financial capability programming and events.

- Attend planning meetings for financial/economics-based events and support such efforts in other markets as needed.
- Work with all WWBIC Clients regarding financial capability and education issues as referred by staff or client request.
- Assist in collection of Employment Information Forms (EIF) on education Clients bi-annually.
- Assist in overall mission of WWBIC by working in a team environment to effectively complete other duties as assigned.

OTHER DUTIES AND RESPONSIBILITIES:

- Work with all WWBIC clients regarding financial capability and education issues as referred by staff or client request.
- Attend community events and meetings as required.
- Miscellaneous duties as assigned

SUPERVISORY RESPONSIBILITY:

- None

QUALIFICATIONS:

Minimum three to five years experience in one-on-one counseling/case management, preferably with low-income individuals or individuals with disabilities. Bachelor's degree or equivalent experience required. Previous Supervisor experience preferred. Must be detail-oriented and possess strong organizational, math, computer (specifically Microsoft Office, Access, etc.), and verbal and written communication skills. Understanding of case management practices is required. Demonstrated ability to communicate effectively and work collaboratively with diverse audiences is necessary. Valid driver's license and proof of liability and property damage insurance on vehicle used is required as position requires some local and statewide travel as well as evening/weekend work required. The ideal person is flexible, positive, and has a sense of humor. Must present a positive, professional appearance at all times.

WORKING CONDITIONS/PHYSICAL DEMANDS:

- Work is generally more sedentary in nature with movement required.
- Work is primarily performed within an office environment with standard office equipment although some travel is required.
- Must be able to read, write, and communicate fluently in English. Must have clarity of vision.

The above statements are intended to describe the general nature and level of work being performed by people assigned to do this job. The above is not intended to be an exhaustive list of all responsibilities and duties required.

*External and internal applicants, as well as position incumbents who become disabled as defined under the Americans With Disabilities Act, must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on a case by case basis.

EOE

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