

Financial Coach – Part-Time

Rate of pay \$20-24 per hour

Reports To: Financial Wellness Manager/ Senior Financial Coach Full-Time

Milwaukee FLSA: Exempt

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

ESSENTIAL JOB FUNCTIONS: *

- Support the Senior Financial Coach (Manager) 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 wellness programs. Monitor progress of clients' financial development plans. Meet with clients as directed by Senior Financial Coach, communicating at minimum on a monthly basis via in person, virtually, phone, or email.
- 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 Match Savings Accounts. Work with Clients on Asset Purchase.
- Coordinate Monthly statements correspondence to Match Savings Account clients.
- Assist Senior Financial Coach in the completion of all required Financial Wellness quarterly funder reports and ensure record keeping is timely and accurate. Provide assistance with program materials, status and outcomes as requested. Meet or exceed required program goals and outcomes.
- Conduct and/or facilitate financial wellness 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 wellness 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, training, Make Your Money Talk Bootcamps (MYMT) and Match Savings Orientations.
- Coordinate and implement regular financial wellness 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 wellness 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 wellness and education issues as referred by staff or client request.
- Assist in collection of Client Information Form (CIF) Business Information Form (BIF), and Employment Information Forms (EIF A, B), on MYMT education Clients bi-annually depending on their asset purchase goal.
- Assist in the 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 wellness 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:

Bachelor's degree or equivalent experience required. 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 duty requirements.



WWBIC
1533 N RiverCenter Drive
Milwaukee, WI 53212
(414) 263-5450

*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

Updated June 24, 2025

-