Financial Empowerment Coach

*Full-time position*

**Location:** located at 3458 Reading Road, Cincinnati, Ohio 45229

**Reports to:** This role reports to the Financial Empowerment Manager

**Position Overview:**

The Financial Empowerment Coach is a key figure in guiding low to moderate-income individuals toward financial stability and wealth building. This multifaceted position involves financial coaching, counseling, educational workshops, community and partner engagement, event management, tax assistance, program coordination, data management, and compliance. We are looking for a candidate who possesses a passion for serving our community, with excellent financial, communication, coaching, and networking skills to effectively push our mission forward and foster positive relationships within the community.

**What you’ll do:**

***Direct Financial Empowerment Services:***

* Monitor and respond to incoming inquiries regarding various programs such as Project LIFT, 700 Credit Club, and other programs promptly.
* Assist participants through the application and intake process for respective programs
* Maintain daily electronic files, records, logs, and case notes to ensure current and organized activity for timely follow-up of direct participant services.
* Track and enter data about participants’ program activities and progress into required databases.
* Collaborate to ensure services are streamlined and documented for participants who are in Project LIFT and other Impact programs.
* Provide one-on-one financial counseling and coaching, tailoring financial solutions to individual client needs.
* Facilitate educational workshops on personal finance, budgeting, credit building, banking products, homeownership, and entrepreneurship.
* Develop action plans for financial stability, focusing on participants' income, spending habits, and unique financial challenges.
* Apply adult learning principles and andragogy to create effective learning environments.

***Coaching and Case Management:***

* Employ collaborative, results-oriented, and asset-based coaching methods.
* Guide clients from a deficit- to asset-based financial perspective.
* Focus on building clients' self-efficacy through goal setting and recognizing small wins.
* Support a caseload of participants from various programs through coaching and case management, ensuring participants make progress toward their goals and motivating them.
* Develop action plans for financial stability through financial literacy and mental health well-being.
* Provide the highest level of customer service to ensure that participants feel valued and model behaviors participants can emulate.
* Reciprocal contact with participants (minimally once per month) utilizing various methods not limited to in-person, phone, social media, mail, etc.
* Conduct follow-up and retention coaching at set intervals post-services to track outcomes.
* Refer participants to strategic partners for additional services as necessary.

***Community Engagement, Partner Engagement, and Relationship Management:***

* Represent the Urban League at local community, civic, and social organizations (United Way partner convenings, ULGSO information sessions, career fairs, community outreach events, etc.)
* Develop professional networks and build rapport with clients and stakeholders.
* Collaborate with financial experts and cultivate partnerships to enhance community outreach and impact.

***Event Management:***

* Plan and organize events focused on financial literacy and generational wealth building.
* Utilize event management software for efficient planning and execution.
* Coordinate volunteer efforts and ensure alignment of events with organizational goals.

***Administrative:***

* Handle event-related administrative tasks including budget management, scheduling, and post-event.
* Efficiently track participant successes and manage data entry and analysis in participant databases.
* Maintain regular contact with graduates, document financial progress, and conduct financial workshops.
* Travel within our regional footprint, attend conferences, and support regional growth and participants.

**What you’ll need:**

* Bachelor’s degree or equivalent experience in human services, business management, or a related field.
* Experience in financial education and familiarity with financial products for those facing financial barriers.
* Preferred experience in the financial sector and community outreach in a non-profit setting.
* Proficient in public speaking and effective crowd management.
* Strong analytical and strategic thinking skills, with the ability to identify gaps and opportunities for improvement in community engagement.
* Ability to adapt to a dynamic work environment and effectively manage multiple tasks and priorities.
* Demonstrated experience working collaboratively across teams to achieve common goals and objectives.
* Strong proficiency in office technology, Microsoft Suite including PowerPoint, excel, outlook, booking and forms, Zoom, Teams, Salesforce, or similar CRM tools.
* Excellent communication skills in both individual and group settings.
* Ability to work effectively in a diverse team environment and manage multiple projects.
* Valid Driver’s License and acceptable driving record.
* Ability to pass required background checks.

**Key Competencies for Success:**

* Business Acumen, Client Relationship Management, Customer Experience Management.
* Decision Making and Critical Thinking, Effective Communications, Prospecting.
* Tech Savvy
* Motivated, self-directed, professional, and teamwork oriented.
* Emphasis on personal development, trust-building, visionary leadership, and inspirational qualities.

**Working environment:**

This is a full-time, in-person position located at 3458 Reading Road, Cincinnati, Ohio 45229. This position requires regular sitting or standing for long periods at a computer; frequent bending, twisting, stooping, and crouching while working at a desk; filing and record handling; regular use of both hands/arms in reaching, handling, grasping, and keyboarding while using a variety of office equipment; frequent use of a telephone and computer to communicate with coworkers and the public; regular standing to use a variety of office equipment; occasionally will lift and carry items up to 30 pounds; regularly communicate in oral and written form with coworkers and with the general public, constant reading, and interpretation of documents.

**Salary information:**

Actual compensation is based on factors such as the candidate's skills, qualifications, and experience.