New Economics for Women®

FINANCIAL COACH

Reports to: Lead Financial Coach	**Pay:** $45,000 -$60,000 (100% FTE) $21.64 - $28.85 per hour	**Employees to be supervised:** N/A **Status:** Salary - Non-Exempt
Location: Van Nuys, CA or/and Canoga Park, CA	**Work Hours:** 8AM - 5PM, Monday - Friday Some evenings and weekends required.	

At NEW, we spark economic mobility. Using our transformative approach, we connect people, communities, and families to their own sense of power and resiliency. We implement a holistic approach in all we do by addressing families' basic needs. From finding a stable and safe place to live, to supporting more ambitious plans like purchasing a home or starting a business.

As an organization, we respect and honor all families, communities and cultures. We encourage innovation and "thinking outside the box", and we expect all employees to connect, create, and celebrate by being authentic, bold, engaged and transformational.

Position Summary:

The Financial Coach serves as an expert in financial education and planning, conducting financial literacy workshops for adults and youth, providing one-on-one financial coaching to a caseload of qualifying clients, and providing free tax preparation and ITIN services, through the FamilySouce Program at NEW's Economic Mobility Center. The Financial Coach also links individuals and families to financial empowerment activities (IDA, America Saves, Cash 4 College, etc...), and creates or cultivates relationships with local banks and other financial institutions. All New Economics for Women staff must understand the organization's purpose, vision and objectives, be knowledgeable of services and resources, and engage in the following activities: outreach, intake/assessments, referrals, and customer follow up. As an ambassador for the organization, this person is also responsible for actively supporting the overall mission and vision of NEW.

Duties and Responsibilities:

Financial Case Management

- Apply a holistic, strength-based approach to working with individuals and families
- Conduct comprehensive assessments, create goal-oriented service plans, and compose case notes that effectively communicate the status and progress of each participant
- Promote active participation in achievement of identified goals through authentic and encouraging professional relationship-building
- Actively engage participants in meaningful, goal-oriented, and supportive coaching sessions
- Effectively manage an active caseload
- Conduct Financial Literacy Workshops
- Develop family savings and asset building plans
- Work with clients to improve credit scores
- Assist families with managing their Individual Development Accounts (IDA)
- Introduce and encourage families to open College Savings Accounts (529) and Individual Retirement Accounts (IRA)
- Establish and sustain working relationships with local financial institutions
- Develop, coordinate, and facilitate activities and services that will assist customers in achieving their goals
- Conduct outreach, and participate in community resource development

General Customer Support:

- Help to create and maintain a welcoming, orderly, and neat environment
- Greet and assist individuals with exceptional customer service
- Assist with general customer applications and referrals
- Ensure customer file contains complete and updated information to include, but not limited, assessments, referrals, services, and case notes
- Maintain a working knowledge of in-house and community resources
- Other responsibilities as assigned.

Qualifications and Experience:

- Bachelor's Degree in Finance, Economics, or related field
- Minimum two (2) years of experience in financial services
- Preferred: social experience and work in the nonprofit sector, experience VITA coordination or tax preparation, invested in community being served
- Trustworthy, cannot impose/steer to specific financial institutions
- Motivator, great public speaking and interpersonal communication skills, ability to network, credit worthiness
- Possess thorough knowledge of laws, regulations and guidelines related to confidentiality
- Excellent verbal and written communication skills
- Excellent and effective public speaking and presentation skills
- Ability to coordinate multiple assignments and prioritize
- Ability to handle sensitive and confidential issues in a professional manner
- Ability to manage crisis situations
- Ability to work independently as well as in a collaborative
- Residency in and /or familiarity with the target area and its cultural diversity
- Excellent knowledge of word processing tools and spreadsheets (MS office word, excel, access, etc…)
- Working knowledge of office equipment and computer hardware and peripheral devices
- Detail-oriented.

Additional Requirements:

- Must have a valid California Driver's License, Liability Insurance, and an automobile in good working condition
- Fingerprinting and TB Clearance
- CPR/First Aid Certification is a plus
- Flexible with working hours, including evenings and weekends
- Fluent in Spanish
- Able to Facilitate in Spanish and English

Apply via **e-mail** or **website only**

Submit your resume with a cover letter:
Via Website: https://neweconomicsforwomen.org/our-job-openings/
Via E-mail to hr@neworg.us
(Please ensure to include the position you are applying for on the subject of your e-mail)

For additional information you may contact Human Resources:
303 S Loma Drive, Los Angeles, CA 90017 | (213) 483-2060 Ext-311

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E-mail hr@neworg.us

Stay Connected:

Learn more about us at: www.neweconomicsforwomen.org

New Economics for Women (NEW) creates economic and educational opportunities for single parents, families and disinvested communities as a pathway for dreams to come true.

EQUAL OPPORTUNITY EMPLOYER