

YourLife

Bilingual Financial Coach



Background

In 1990, a group of visionary women established The Women's Resource on the founding belief that *a woman who controls her finances controls her destiny*. We fulfill our mission by offering **YourLife Finance** programs for women and our **RISE!** (Your Road to Independence, Success, and Empowerment) program for high school girls. **YourLife Finance Classes** (YLFC) teach women fundamental financial concepts such as banking, saving, budgeting, credit management, and debt. We also offer financial coaching through **YourLife Possibility Groups** (YLPG) and **YourLife Coaching** (YLC) to guide and support women as they work toward their financial goals. We believe these valuable life lessons are best learned young and created **RISE!** to address this need as early as possible in a young woman's life.

Position Description

The YourLife Financial Coach is essential to the success of the organization and provides one-on-one financial coaching to women who have taken YourLife Finance Classes, participated in YourLife Possibility Groups or self-select into the program.

Responsibilities

- Identify new clients through outreach efforts
- Contact potential clients who have expressed interest in one-on-one coaching
- Support and maintain coaching relationship with clients exiting YourLife Possibility Groups
- Coordinate one-on-one coaching schedule
- Assist clients with goal setting, budgeting, credit building, debt repayment, savings
- Empower the client through client-directed coaching
- Provide introduction or linkage to relevant community resources and/or financial products
- Encourage clients as they work toward established financial goals
- Monitor client's progress toward goal completion
- Follow up with clients at regular intervals
- Utilize coaching forms during coaching sessions to empower the client and record progress
- Collect required documentation and ensure data is complete
- Record data in Salesforce database and use to inform practice
- Assist in program report preparation and analysis
- Conduct financial education classes as a means of outreach and education
- Report to and work closely with the Senior Program Director
- Engage in continuous quality improvement, learning and training
- Ensure coaching is delivered in a high-quality manner
- Ensure annual program goals and objectives are met
- Ensure safety and confidentiality standards are met

Qualifications

- Bachelor degree required
- Bilingual in English and Spanish required
- Must have reliable transportation
- Ability to work in a remote environment
- Ability to effectively organize and manage time
- Passion to help others help themselves
- Self-directed, independent worker who takes initiative and is able to solve problems
- Attention to detail and ability to respond to deadlines on time
- Excellent organizational, verbal, written and interpersonal communication skills
- Professional that works with poise, confidence and team-oriented approach

- Understanding of how financial education/coaching affects an individual
- Flexible and positive attitude, sense of humor, patience, character and integrity
- Non-profit experience or demonstrated thorough understanding of the field
- Advanced proficiency in Microsoft Office products (Outlook, Word, Excel)

The ideal candidate will have experience in two or more of the following:

- Financial coaching
- Financial education and/or asset building
- Strong understanding of personal finance (specifically around budgeting, asset building and credit building)
- Experience working with clients toward goals that require behavior change
- Experience working with low to moderate income individuals

Full-time Position: Competitive/commensurate with experience and other qualifications

Application Process

The position will remain open until filled. All candidates are asked to EMAIL the three documents listed below to kkeith@thewomensresource.org

Documents should be addressed to: Kelly Keith, Senior Program Director

1. Cover letter stating how your skills are a match for the position requirements and duties
2. Resume
3. Writing sample that addresses the following scenario. (100-250 words per email, 12 point font)
Scenario: Write an email to a YourLife Coaching client.

Only qualified applicants that submit ALL documents requested above will be considered.

We appreciate your interest in our organization.

NO PHONE CALLS OR EMAIL INQUIRIES PLEASE