

Neighborhood Trust Financial Partners seeks mission-driven Financial Coaches to deliver our full package of financial empowerment services to low- and moderate-income individuals in pursuit of their financial goals.

### **ABOUT NEIGHBORHOOD TRUST**

Neighborhood Trust's mission is to empower low-income individuals to become productive participants in the U.S. financial system and achieve their financial goals. Annually, Neighborhood Trust reaches nearly 10,000 individuals on a national scale through its innovative programs. With more than 20 years of experience, Neighborhood Trust emerged as an early pioneer in the financial empowerment field and continues to be an industry leader. Today we have programs that deliver services locally in New York City as well as nationally via our Trusted Advisor workplace financial wellness benefit.

### **POSITION DETAILS**

Financial Coaches assess clients' financial health through one-on-one coaching and then develop a tailored set of recommendations to help clients improve their financial position and pursue their goals. Some programs involve in-person service delivery and others are tech-enabled, allowing us to serve clients across geographies via phone sessions or video conferencing. In both cases, we leverage multiple communication channels – phone, SMS, email - to engage our clients and provide follow-up services. In addition to individualized coaching sessions, some Financial Coaches may also deliver financial capability courses for groups. Financial Coaches require excellent judgement and must exercise professional discretion to accurately assess each client's unique situation and effectively develop personalized plans of action. These plans include concrete recommendations for debt reduction, credit improvement, money management, use of financial services, asset protection and the pursuit of short- and long-term goals.

The services offered by Financial Coaches are scheduled to meet the needs of our clients. As such, schedules regularly include evenings, early mornings and weekends. Our local services are delivered at community-based organizations and involve travel throughout the city. Financial Coaches work with a high degree of independence. With local programs, Coaches are often embedded within partner organizations for significant amounts of their assigned work time, serving as the sole on-site representative for Neighborhood Trust.

### **Principal Responsibilities**

As part of an innovative and dynamic organization, the position is actively evolving and responsibilities change as services are refined and new partnerships develop. The following are responsibilities assigned to Financial Coaches depending on details of work assignment.

- Work directly with clients to provide high-quality financial coaching via individualized counseling and financial capability course, including the delivery of personalized Financial Action Plans
- Provide ongoing support and continue to actively engage program participants to promote financial health
- Document services and gather session data for program reporting and evaluation
- Achieve program goals for client impact and service outputs, taking initiative with client outreach
- Deliver brief and persuasive presentations on our services to potential clients or referring partners

- Participate in regular team meetings and continued skill-building training sessions
- Research financial products, consumer rights, and resources on an ongoing basis
  - Due to the breadth of personal financial topics, the evolving nature of consumer protections and the shifting landscape of financial products and consumer resources, Financial Coaches are responsible for ownership of their ongoing learning and skill development
- Represent Neighborhood Trust in media inquiries, at events within the field, and with peer organizations

### Qualifications

#### Required Qualifications:

- Specialized training in financial empowerment services to low and moderate income individuals.
  - Applicants without prior training but who have professional or comparable knowledge about personal finances (money management, savings, financial services, consumer rights) may be considered for the position but must complete Neighborhood Trust’s Financial Empowerment Training course upon hire and successfully pass all exams in order to serve in position.
- Two years of full time work experience in personal finance, education, social services, community organizing or a related field.

#### Required Skills and Attributes:

- Self-motivated - able to work independently, meet deadlines without supervision and take ownership of personal finance research and continued learning
- Excellent communication and interpersonal skills; ideally coaching and teaching/facilitation skills with adults or in non-traditional settings
- Ability to exercise knowledge-based professional judgement and discretion to adapt services as needed
- Strong attention to detail
- Robust critical thinking skills
- Ability to effectively receive and implement feedback
- Bilingual strongly preferred – ideally in Spanish/English or Bengali/English

### COMPENSATION

Competitive salary and benefits package offered.

### TO APPLY

Please send resume and cover letter to [hr@neighborhoodtrust.org](mailto:hr@neighborhoodtrust.org) with the subject line “Financial Coach”.

Neighborhood Trust is committed to a workplace culture of collaboration and respect. We are dedicated to ongoing professional development for our employees, supporting career growth and opportunities for advancement within the organization. Neighborhood Trust is an equal opportunity employer and we are committed to equal employment opportunity in all decisions related to employment, promotion, wages, benefits and all other privileges, terms and conditions of employment.