



## JOB ANNOUNCEMENT

### FINANCIAL COACH

**SUMMARY:** Reporting to the Director of Family Support Services, the Financial Coach provides case management, support services, and financial workshops and coaching for low-income youth and families as part of the Hollywood Family Source Center network. The financial coach will work closely with clients to develop personalized financial plans, provide guidance on budgeting, debt management, and savings strategies, and connect clients with resources to help them achieve their goals.

**ESSENTIAL JOB ACTIVITIES AND RESPONSIBILITIES:** The essential job activities described here are representative of those that must be met by an employee to perform the essential functions of this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

- Identify a minimum of 200 unduplicated households per year
- Enroll youth and families in the FSC program and pre-screen for social services
- Conducting financial assessments to identify families' financial needs and goals.
- Developing personalized financial plans that align with families' goals and income.
- Providing ongoing financial education and support to families.
- Helping families create and maintain a budget to manage their expenses.
- Coaching families on how to save and invest for their future.
- Connecting families to community resources that can help them achieve their financial goals.
- Monitoring families' progress and making adjustments to their financial plans as needed
- Tracking and reporting on families' progress to case managers.
- Conduct both Financial Literacy workshops and Coaching sessions with clients.
- Assist with universal and intensive intakes
- Maintain accurate records in Bresee and program-specific client databases and provide documentation and/or prepare periodic program reports as required.
- Maintain accurate and up-to-date client record, documenting all interactions, assessments, and referrals made.
- Participate in FSC team meetings and events, staff meetings, and other Bresee, collaborative partner or community meetings as requested.

**EDUCATION/EXPERIENCE/QUALIFICATIONS:** The requirements listed below are representative of the knowledge, skill, and/or ability required.

- Must hold a bachelor's degree from an accredited college or university in finance or social service field -OR- in the absence of the bachelor's degree, the financial coach

must be certified as a financial coach or be a high school graduate with a minimum of four years demonstrated experience providing financial capability programs.

- Must be bilingual in Spanish, proficient in speaking, writing, and reading.
- Minimum two-years working in a nonprofit social service agency.
- Excellent communication and interpersonal skills.
- Ability to work independently and as part of a team.
- Strong organizational and time management skills.
- Able to set priorities and organize daily workload to meet deadlines, program goals, and requirements.
- Able to efficiently process multiple projects at a time without sacrificing the quality of work.
- Demonstrate flexibility when new assignments or changes are introduced.
- Must follow program-specific requirements and policies.
- Establish and sustain working relationships with local financial institutions.
- Demonstrate computer competency with Microsoft Office tools, including Word, Excel, PowerPoint, Google applications and email applications, and database systems.
- Must submit to and successfully pass a criminal history background check.
- Must support Bresee's procedures and policies.
- Must understand and support Foundation's *Vision, Mission, and Values Statement*.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to perform the essential functions of this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is frequently required to sit, stand, walk, bend, lift and carry objects, and drive. The job requires frequent verbal and written communication. Computer, telephone, copier, and fax use are required.

**FLSA STATUS:** Non-Exempt. Regular. Full-time. Occasional weekend and evening hours will be necessary.

**COMPENSATION:** \$58,000 - \$63,000, Pay Range

**WORKING LOCATION:** On-site.

**BENEFITS:** Benefits include medical and dental coverage; vacation, holiday, and sick pay; group life insurance and 401k type pension plan. Bresee provides generous PTO days that include paid holidays, one-week Christmas holidays, vacation, sick pay, paid birthday holidays, and much more.

**TO APPLY:** Submit a cover letter, resume, and writing sample (not to exceed 1 page) to [jobs@bresee.org](mailto:jobs@bresee.org) with the Subject Line: Financial Coach.

DACA, women, BIPOC, LGBTQIA+ people are encouraged to apply.