

Financial Pathway - Financial Coach (Harmony Financial Network)

The Financial Coach position offers a unique opportunity to help low to moderate income families change financial behavior, build assets, and become financially stable. Financial Pathway provides individualized financial coaching upon request for participants to help them reach target goals including credit score; budgeting; saving; utilization of quality financial services; and asset development. The Financial Coach will work directly with individuals/couples in our Financial Pathway program to assist individuals/couples reach their educational, financial, and asset goals.

Primary Areas of Responsibility:

- **Financial Coaching:** Provide one-on-one coaching for participants in Harmony CDC's Financial Pathway program. Assist participants with goal setting, budgeting, credit building/rebuilding, debt repayment, savings, utilization for quality financial services, and asset development. Monitor participant progress toward financial goals. Follow up with participants on referrals to other financial service professionals when applicable. Maintains files and database for all participants including the intake form, credit report, coach's appointment notes, analysis and corrective action plan.
- **Financial Education Classes/Workshops:** Develop and conduct financial education classes. Oversee participant performance at onsite financial education classes.
- **Data Collection And Evaluation:** Collect and verify all required data from participants throughout the program, including Combined Financial Assessment and Financial Profile. Assist in program reports preparation
- **Resource Development:** Identify and refer participants to other resources and services needed to achieve their financial goal.
- **General Program Support:** Provide support, as needed, to other core programs including cross training in other service areas. Assists with special projects as assigned and other tasks deemed necessary to achieve overall goals and to operate a successful program.
- **Policy and Guidelines:** Adheres to all guidelines related to confidentiality. Follow regulatory and quality-control requirements. Works to ensure that satisfaction is a priority of the coaching program.

Personal Qualities:

- Highly engaged listener

- Demonstrates ability to interact effectively and confidently with individuals at all social and economic levels that utilize or support Harmony CDC programs and services
- Ability to work independently and as a productive team member.
- Flexible, adaptive, and positive in a constantly changing environment
- Detail-oriented, with a willingness to learn new skills and techniques to promote quality, efficiency, and successful customer outcomes.
- Ability to sense when clients are overwhelmed and to break major objectives in manageable steps.
- Engage/motivate/encourage Pathway participants and help them resolve financial challenges and accomplish goals.
- Creative, practical, and strategic problem-solving skills