

JOB DESCRIPTION

POSITION: Financial Coach

PROGRAM: FamilySource Center

Salary Range: \$ 49,920 – \$58,236 DOE

Position Summary:

The FamilySource Center (FSC) program is funded by the City of Los Angeles Community Investment For Family Department (CIFDLA) This FSC program serves as the City's delivery system for anti-poverty initiatives by providing a continuum of core services designed to assist low income families in becoming self-sufficient by increasing family asset-building; to also provide college prep and youth academic achievement services. Core services include: Multi Benefit Screening, Information & Referral Assistance, Case Management, Financial Coaching, Pre-Employment Support, Tax-preparation, Your Benefits Now; Parenting Classes, Supportive Services, Legal Services, and the following youth base services for youth 13 and 17 years' age: Tutoring Services; Mentoring; Youth Leadership; Cash for College; FAFSA workshops; "COLLEGE CORNER"; Summer Academic Enrichment Camp; Art & Cultural Activities; college field trips.

Under the supervision of the FSC Program Manager, the Financial Coach is responsible for providing and implementing services under the City of Los Angeles FAMILYSOURCE CENTER Contract. The Financial Coach will provide one-on-one financial coaching services in-person and remotely to accommodate customer needs. This position requires in person work Monday-Friday. Services shall include, but not be limited to financial empowerment and asset building programs in savings, debt reduction, credit building, and banking. The financial coach will also arrange for the provision of curriculum-based financial literacy training and training modules that expose customer to financial concepts, terminology, and money management strategies.

DUTIES:

- Provides intake and financial well-being assessments
- Conduct a minimum of 3 individual, one-on-one coaching sessions that are a minimum of 30 minutes each and include the completion of at least one milestone or action step in each session
- Create an Action Plan with each customer to ensure the customer is working toward their self-identified, financial goals
- Incorporate services into the customer service plan in partnership with the case manager, including case conferences and discussions
- Implement customer retention and engagement strategies to help customers achieve their financial goals.
- Collaborate with Intake/Data Entry to ensure all documentation is complete and entered into the database.
- Participates in community outreach activities and Special Events year round, including food and fund distributions.
- Participates in events and projects assigned by CIFDLA



- Connect and link client/family to FSC program and activities, and other LRO – WLA FamilySource Center services, and community resources to assist with meeting goals of improving Family income and Academic Achievement.
- Meet and maintain caseload productivity requirement to meet program contract objectives.
- Oversee and cultivate relationships with specific internal and external partnerships and programming activities assigned by Supervisor
- Completes required program documentation, client files, case notes, and reports with accuracy and attention to detail.
- Engages and participates in regular staff meeting and trainings.
- Initiate crisis intervention when crisis related incidents occur with clients or families at WLAFC.

QUALIFICATIONS: The requirements listed below are representative of the knowledge, skills and/or abilities required to perform the job successfully.

EDUCATION/ EXPERIENCE/ SKILLS:

- Bachelor Degree in Finance or BA degree in a related field from accredited university.
- 4 years of experience or certification in Financial Coaching
- 1-2 years of experience providing financial coaching services to low-income community in nonprofit setting.
- Must be able to work with diverse populations.
- Bilingual preferred (English/Spanish).
- Strong written and verbal communication skills.
- Good time management and organizational skills.

SPECIAL REQUIREMENTS:

- Must be able to work evenings and weekends as needed.
- Employment is subject to applicants' successful completion of a criminal background check and/or life scan as required by the Federal, State, City of Los Angeles and local government entities.
- TB clearance, to be renewed every two years.

Must have reliable transportation, a valid California Driver License and State required automobile insurance coverage.

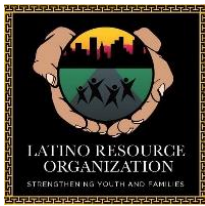
Location/Site: 1645 Corinth Ave. California Ave., CA. 90025

Benefits: Includes health insurance, paid-time-off, and holidays.

Job Type: Full-time

Salary: \$26.00 per hour

Benefits:



- 401(k)
- Health insurance
- Paid time off

Schedule:

- 8 hour shift
- Monday to Friday, some Saturdays.

Education:

- Bachelor's (Preferred)

Experience:

- FINANCIAL COACHING: 1 year (Required)

Must have reliable transportation, a valid California Driver License and State required automobile insurance coverage.

Location/Site: North Hollywood – Sun Valley