



## **Haven Neighborhood Services Job Description**

**POSITION TITLE:** Financial Coach  
**SUBMISSION CLOSING DATE:** January 29, 2021  
**LOCATION:** Los Angeles  
**REPORTS TO:** Program Director  
**FLSA CATEGORY:** Non-Exempt

### **ORGANIZATION BACKGROUND**

At Haven Neighborhood Services, *our mission is to financially empower vulnerable communities in Los Angeles County by providing no-cost financial and housing services to end their financial and housing crisis.* For a decade, Haven Neighborhood Services, a 501 (c)(3) nonprofit organization has maintained an unwavering commitment to financial health, housing security, and education of our community members. All services that Haven Neighborhood Services provides are FREE at no-cost to our clients. Our organization, founded during the aftermath of the 2008 Economic Recession, addresses financial and housing crises among economically vulnerable individuals and families.

### **GENERAL PURPOSE**

Financial coaching empowers low-to moderate-income families and individuals to accomplish personalized goals related to improving their own financial well-being. 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. Haven Neighborhood Services performs financial coaching in partnership with local non-profits to financially empower communities and beyond.

### **ESSENTIAL JOB FUNCTIONS AND 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 work, 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.
- Participate in regular team meetings and continued skill-building training sessions
- Research financial products, consumer rights, and resources on an ongoing basis.
- Represent Haven Neighborhood Services at events within the field, and with peer organizations.

## **MINIMUM JOB REQUIREMENTS**

- Specialized training in financial empowerment services to low- to 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.
- Two years of full-time work experience in personal finance, education, social services, community organizing or a related field.
- Four years of college, or equivalent work experience.

## **KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED**

- Must be able to exercise independent judgment and make decisions based upon the analysis of individual, unique factors.
- Must be computer literate, able to access e-mail, electronic calendars and the Internet; experience required with a variety of software applications including Microsoft Word, and Excel.
- Must be able to master CounselorMax, Salesforce, and Change Machine software.
- Must have excellent analytical and communication skills, both orally and in writing.
- Must have good interpersonal and customer service skills and a strong ability to deal effectively with the public.
- Must have good advocacy skills and a strong ability to deal effectively with financial services industry.
- Ability to work under pressure. Detail oriented and able to multi-task. Ability to adapt to and embrace change in a rapidly changing environment.
- Community based non-profit experience highly desirable
- Ability to maintain the privacy of client information.
- Availability to travel by plane out of the State to attend mandatory training as requested.
- Spanish and other languages spoken is highly desirable.

## **WORKING CONDITIONS**

The Financial Coach position is a sedentary to light work position. Required to talk and hear and use the telephone for extended periods of time. Required to sit and use his or her hands and fingers, and to manipulate keys on a computer keyboard, for extended periods of time. The employee is occasionally required to stand, walk, reach with arms and hands, climb or balance, and to stoop, kneel, crouch or crawl. Vision demands include close, relatively detailed vision when entering and working with data, and using a computer screen. Also required to conduct financial literacy classes in various locations throughout Los Angeles County. Work is normally performed in an indoor office work environment. While performing the duties of this job, the employee is occasionally exposed to moving mechanical equipment parts. The noise level in the work environment is usually quiet to moderate.

## **INSTRUCTION**

Please send your resume and cover letter to [info@havenservices.org](mailto:info@havenservices.org)

*As duties and responsibilities change, this job description will be reviewed and subject to changes of organization's necessity. Haven Neighborhood Services supports a drug-free work*

*environment and requires pre-employment background and drug screening. Haven Neighborhood Service is an Equal Opportunity Employer.*