



<b>Job Title</b>	<i>Financial Coach</i>
<b>Department</b>	<i>Career Mobility Action Plan (CMAP)</i>
<b>Reports to</b>	<i>Career Mobility Action Plan (CMAP) Program Director</i>
<b>Location</b>	<i>Washington, DC</i>
<b>Position Type</b>	<i>Regular, Full-time</i>
<b>Exemption Status</b>	<i>Exempt</i>
<b>EEO Classification</b>	<i>0950</i>
<b>Date</b>	<i>September 2024</i>

### **General Summary**

The Greater Washington Urban League is looking for a passionate and skilled Financial Coach to join the Career MAP team. The Financial Coach will provide personalized financial coaching and education to low- to no-income individuals. This role focuses on empowering clients to build long-term financial stability by offering tailored advice, support, and strategies in areas such as budgeting, savings, credit repair, and debt management.

### **Essential Duties and Responsibilities**

- Provide individualized financial coaching to program participants, helping them assess their current financial situation and develop actionable improvement plans.
- Guide clients through the process of setting financial goals, creating budgets, managing debt, and building savings, while helping them track their progress.
- Conduct financial literacy workshops covering topics such as credit building, budgeting, savings strategies, and long-term financial planning.
- Support clients in repairing and building their credit, providing strategies and resources to improve their credit scores.
- Assist clients with identifying and accessing resources such as public benefits, financial aid, tax preparation services, and affordable banking options.
- Act as a mentor and motivator, encouraging clients to take control of their financial future and build healthy financial habits.
- Collaborate with Career MAP team members to integrate financial coaching with other services such as career development and workforce readiness.
- Stay informed about the latest best practices in financial empowerment and coaching to continuously improve the effectiveness of the coaching program.
- Track client outcomes and progress over time, ensuring goals are met and adjustments are made as necessary.
- Develop partnerships with local financial institutions, community organizations, and other relevant stakeholders to broaden the scope of financial support for clients.

### **Qualifications**

- Bachelor's degree in finance, economics, social work, or a related field.
- A minimum of 3 years of experience in financial coaching, counseling, or a related role focusing on low-income populations.
- Strong knowledge of financial literacy principles, credit building, debt management, and financial empowerment strategies.
- Certification in financial coaching or counseling (such as AFC®, FFC®, or similar) is highly preferred.
- Excellent interpersonal and coaching skills, with the ability to connect with and motivate clients from diverse backgrounds.



## Job Description

- Experience working with low- to no-income individuals, understanding the specific challenges they face in achieving financial stability.
- Ability to facilitate financial education workshops and lead group coaching sessions.
- Excellent written and verbal communication skills.
- Strong proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other relevant software.
- Superior organizational skills with the ability to multitask and manage time efficiently.
- Strong attention to detail, particularly in scheduling, document preparation, and budget management.
- Must be a U.S. citizen;
- Must successfully complete a criminal background investigation;
- Strong verbal and written communication skills; leadership and team-building skills are a must.
- Must be detail-oriented and possess organization and critical thinking skills

### **Working Conditions**

The employee will be working in a normal office setting to include a possible hybrid schedule.

### **Physical Requirements**

While performing the duties of this job, the employee will frequently sit, stand, walk, and reach. May need to lift files or packages periodically.

### **Other Duties**

This job description is intended to describe the general nature and work performed by employees but is not a complete list of activities, duties, or responsibilities required of personnel. Furthermore, other duties, responsibilities, and activities may change or be assigned at the discretion of the employer.

### **Direct Reports**

None.

### **Signature**

The employee signature below constitutes the employee's understanding of the requirements, essential functions, and duties of the position.

Employee Name: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

<b>Approved By:</b>	
<b>Date Approved:</b>	
<b>Reviewed:</b>	

Provided for reference only.  
Always consult current legislation in your jurisdiction to create policies and procedures for your organization.