



POSITION ANNOUNCEMENT

POSITION: Financial Coach

OPEN: Immediately

LOCATION: Chicago, IL

CLOSE: Until filled

CONTACT: Erica Mancinas

SALARY: Commensurate with experience

BACKGROUND

UnidosUS, previously known as NCLR (National Council of La Raza), is the nation's largest Hispanic civil rights and advocacy organization. Through its unique combination of expert research, advocacy, programs, and an Affiliate Network of nearly 300 community-based organizations across the United States and Puerto Rico, UnidosUS simultaneously challenges the social, economic, and political barriers that affect Latinos at the national and local levels. For more than 50 years, UnidosUS has united communities and different groups seeking common ground through collaboration, and that share a desire to make our community stronger. For more information on UnidosUS, visit www.unidosus.org or follow us on Facebook, Instagram, and Twitter.

SUMMARY

The Financial Coach is a one-year contract tied to UnidosUS's *Caminos* initiative and will report to the Financial Empowerment Network (FEN) Program Manager. This person will contribute by providing financial coaching to clients consistent with the organization's policies, procedures, and quality standards. This person will engage clients across the country to provide telephonic or virtual ongoing financial coaching. In collaboration with the UnidosUS Counseling Connection and other team members in the FEN, this person will work to ensure programmatic deliverables for the *Caminos* initiative are met. The *Caminos* initiative began on March 1, 2022, and will continue until March 31, 2023. This financial coach position is a one-year, full-time contract.

RESPONSIBILITIES

- Receive client referrals from the UnidosUS Counseling Connection and reach out to the client promptly to schedule financial coaching session
- Conduct one-on-one financial coaching via phone or video conference with clients referred.
 - Assess the client's financial situation based on the information provided.
 - Assist clients in developing a budget and setting financial goals.

- Produce written action plans that support the course of action and promote the client's best interests and choice of action.
- Motivate clients to implement the established plan.
- Create and analyze financial coaching reports to guide program priorities and performance.
- Manage client caseload, to include:
 - Following up with clients through the duration of the program.
 - Develop strategies for addressing financial objectives.
 - Interact with clients, in a professional, responsive, helpful, and positive manner.
 - Provide additional consultation, resources, and guidance on finance and housing issues.
 - Ensure client files are complete with required note documentation, signed disclosures/release forms, proper case management data entry, etc.
- Participate in staff meetings and training as scheduled.
- Interact with staff, funding partners, and clients helpfully and positively.
- Other duties as assigned by the supervisor.

QUALIFICATIONS

- Associate Degree or BA in Business, Education, Community Development, or related field.
- Minimum of five (5) years of experience working as a Financial Coach or Counselor.
- Steadfast commitment to UnidosUS's mission, vision, and values (Excellence, *Respeto*, Accountability).
- Familiarity and commitment with the U.S. Latino community, Latino nonprofit organizations, and the Latino market are a plus.
- Ability to communicate, and motivate clients and colleagues to achieve goals.
- Ability to pick up on concepts quickly and exercise appropriate judgment.
- Excellent communication skills, both oral and written.
- Proven ability to handle multiple activities and meet deadlines.
- Commitment to excellence and high standards.
- At a minimum, intermediate level expertise in MS 365 Suite (Excel, Word, Teams SharePoint.)
- Ability to work independently and as a member of various teams and committees.
- Acute attention to detail.
- Bilingual required (Spanish-English).
- Telephonic or virtual financial coaching experience is required.

Employment with UnidosUS is contingent upon successful completion of a background screen.

Please note: Only those applicants who submit a cover letter and résumé will be considered for this opportunity.

SEND COVER LETTER AND RÉSUMÉ TO:

UnidosUS hrmail@unidosus.org

Subject Line: Financial Coach

Attn: Erica Mancinas, FEN Program Manager

No phone calls please!

EQUAL OPPORTUNITY EMPLOYER. All qualified applicants will receive consideration without regard to race, color, national origin, marital status, religion, gender, age, disability, sexual orientation, gender identity or expression, personal appearance, family responsibilities, political affiliation, or enrollment in a college, university, technical school, or adult education.