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**Position Title: Financial Coach**

*Department:* Local Initiatives Support Corporation (LISC) Grant

*Reports to:* LISC Program Manager

*FLSA Status:* Exempt (0.8 FTE)

*Starting Date:* As soon as possible after hire

**Position Purpose**

The Financial Coach provides direct service to the refugee and immigrant students in the International Institute's Medical Careers Pathway and Hospitality Careers Pathway programs. The Financial Coach will guide participants in developing financial plans of action intended to help them reach their targeted goals.

**Position Duties and Responsibilities**

- Provide one-to-one coaching for New American participants, assisting with goal setting, budgeting, credit building, debt repayment, savings, utilization of financial services, and asset development
- Monitor participant progress toward financial goals, using the client management system *Salesforce*, and help prepare regular program reports
- Prepare and present financial literacy classes and workshops to groups of participants
- Work with classroom instructors, employment counselors, and other Medical Careers Pathway and Hospitality Careers Pathway staff members to provide integrated services to participants
- Help participants to access other financial resources and services needed to achieve their goals
- Cultivate and maintain relationships with key financial and community partners
- Assist, as assigned, with special projects and attend trainings and workshops as deemed necessary to achieve overall goals and to operate a successful program
- Attend Institute staff meetings, peer support meetings of LISC financial coaches, and other program-related meetings as required

**Position Requirements**

- A bachelor's degree
- A strong understanding of personal finances, especially in the areas of budgeting, credit building, and asset development
- Previous work experience in the financial sector is a plus
- Strong written and oral communication skills
- Experience working with refugees and immigrants, and/or the ability to provide financial coaching services in a culturally sensitive manner
- Proficiency in Microsoft Word, Excel, and Power Point, and the ability to learn the *Salesforce* client management system
- Ability to work independently and as a member of a team
- Patience in engaging/motivating/encouraging program participants in order to help them resolve financial challenges and accomplish goals
- A car, with adequate insurance

**To apply:**

Submit cover letter and résumé to Kate Raleigh via e-mail ([kraleigh@iimn.org](mailto:kraleigh@iimn.org)). No telephone calls or walk-ins please. Position is open until filled.