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**Job Title: Financial Coach**

**Department:** Financial Empowerment

**Reports To:** Financial Empowerment Program Manager

**FLSA Status:** 37.5 hours per week (1 FTE)(Exempt)

**Salary Range:** \$45,000 - \$47,000

**Prepared Date:** 12/17/2021

**Organization Description:**

The International Institute of Minnesota (IIM) is a fast-paced, innovative organization with talented staff who are mission driven and support one another in their work. Since 1974 IIM has resettled 25,000 refugees in the Twin Cities and remains one of the largest sponsors of refugees statewide. Its immigration and citizenship services helped nearly 15,000 New Americans achieve U.S. citizenship since 2001. From 2012 to 2018, IIM experienced exponential growth, establishing the organization as an expert in education and workforce development for immigrant and refugee communities. With more than 21 million refugees worldwide waiting to begin new lives, and an increasing workforce shortage in Minnesota, IIM's programs continue to be in demand and important abroad and in Minnesota.

**Purpose:**

The Financial Coach provides direct service to the refugee and immigrant clients in three areas: financial coaching, homeownership advising and guaranteed income project coordination. The financial coaching program guides participants in developing financial plans of action intended to help them reach their targeted goals. The homeownership advising program assists clients who have a homeownership goal to develop their finances to achieve that goal, connecting them to homeownership resources and guide them through each step of the homebuying process. The guaranteed income program is a research-based pilot project through the city of St. Paul which provides a guaranteed minimum monthly income to families to allow them to stay above the poverty line.

**Duties and Responsibilities:**

- Communicate and meet regularly with program participants to monitor progress towards goals, and to help participants identify and access financial resources and services needed to achieve their goals
- Work with classroom instructors, employment counselors, program partners and other staff members to provide integrated services to participants
- Complete data entry, using multiple client data management systems to ensure program compliance, preparing regular program reports as needed

- Maintain relationships with key financial, community and program partners
- Attend IIM Financial Empowerment team meetings, IIM staff meetings, and partner meetings, as scheduled
- Assist, as assigned, with special projects, attend trainings and workshops and obtain certifications as deemed necessary to achieve overall goals and to operate successful programs
- Work, along with all Institute staff, at the annual Festival of Nations

#### Financial Coaching Program

- Provide one-to-one coaching for New American participants, assisting with goal setting, budgeting, credit building, debt repayment, savings, utilization of financial services, asset development
- Prepare and present financial literacy classes and workshops to groups of participants
- Communicate with pathway program managers about schedules for financial literacy classes, and contact students to make one-to-one to make appointments for comprehensive financial assessments.

#### Home Ownership Advising Program

- Provide one-to-one advising to program participants throughout the home buying process
- Coordinate and teach Homestretch workshops
- Communicate with clients to schedule advising appointments

#### Guaranteed Income Project

- Select and enroll families in the pilot project assisting them with paperwork, research surveys, opening appropriate accounts or cards, and connecting participants to research
- Arrange for translation of enrollment, consent documents and program materials
- Provide benefits counseling and ongoing support to participant families about payments and potential impact to benefit eligibility

#### **Requirements:**

- A bachelor's degree (finance, accounting, or similar field preferred but not required)
- A strong understanding of personal finances, especially in the areas of budgeting, credit building, asset development, and the home buying process
- Previous work experience in the financial or real estate sector is a plus
- Experience working with refugees and immigrants, and/or the ability to provide financial coaching and homeownership advising services in a culturally sensitive manner
- Proficiency in Microsoft Word, Excel, and Power Point, and the ability to learn several client data management systems
- Ability to work independently and as a member of a team
- Patience in engaging/motivating/encouraging program participants to help them resolve financial challenges and accomplish goals
- A car, with adequate insurance
- Fluency in Pashto, Dari, Somali, Oromo, Amharic, or another language of our students is preferred but not required
- Strong organizational skills and a high attention to detail
- Proven oral and written communication skills, including negotiation and problem solving.
- Fully vaccinated for COVID-19
- Demonstrated commitment to the International Institute of Minnesota mission and vision

**Physical Demands:**

- Use of manual dexterity, tactile, visual, and audio acuity.
- Use of repetitive motion, prolonged periods of sitting, and sustained visual and mental applications and demands.
- Occasional lifting (up to 25 pounds), bending, pulling, and carrying.

**EEO Statement:**

International Institute of MN is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran, or disability status.

**To Apply:**

Submit cover letter and resume to Tanya Battista via email (tbattista@iimn.org). Position opened until filled. No phone calls or walk-ins please.

Revised: 12/17/2021