



Job Description:

I. **Job Title:** **Financial Counselor**

II. **Job Location:** 516 S. Main Street, Elkhart, IN or 202 N. Cottage Avenue Goshen, IN

III. **Position Reporting Relationships:**

- Financial Counselor reports to the VP of Client Empowerment Services
- Reporting and compliance responsibilities to the AVP of Operations
- Works as an integral part of the Financial Empowerment Team, working within the Client Empowerment Services Department to provide exceptional service to Lacasa, Inc. clients

IV. **General Description of Primary Job Responsibilities:**

The Financial Counselor provides financial empowerment services including, but not limited to:

- i. Group class instructor for Financial Education classes, including money management, managing debt, credit building, and future topics added to the education platform, using a dialogue education style of adult education facilitation
- ii. Individual contributor to the development of class curriculum
- iii. Financial Coach providing 1:1 coaching sessions for clients on a variety of financial topics, providing Individualized Action Plans, Goal Setting, Accountability and Motivation
- iv. LEAP Coach (Workplace Financial Coaching – virtual)
- v. Homeownership Counseling, including Pre-Purchase Counseling and HUD-approved Homebuyer Education; HUD-certification will be required within 6-12 months of hire
- vi. Client Account Administrator, including managing Individual Development Accounts (IDA's – Matched-savings accounts) for assigned clients
- vii. Financial Capabilities Counselor - obtain and maintain necessary certifications for Financial Counselor role as determined by the VP of Client Empowerment Services and attend continuing education by NeighborWorks and any other organizational education or conference recommended by the VP of Client Empowerment Services
- viii. Community liaison and ambassador for Lacasa Financial Empowerment Services

V. **Administrative Support:**

- i. Office responsibility
 1. Follow opening and closing security procedures
 2. Ensure quality client experience while working in a virtual receptionist environment
- ii. Documentation
 1. Keep up to date with daily task assignments and document progress
 2. Effectively use Salesforce to enter client data, including client session notes
 3. Maintain copies of client forms as required by program

- iii. Client File Management
 - 1. Collect and maintain client records in accordance with all laws and governing agencies, such as, but not limited to the U.S. Department of Housing and Urban Development (HUD), NeighborWorks America, Indiana Housing and Community Development Authority (IHCDA), among others.
 - 2. Keep files up to date, entering notes in a timely manner
- iv. Other tasks, as assigned

VI. **Professional Attributes:**

- I. Collaborative contributor
- II. Creative and Engaging
- III. Professional demeanor
- IV. Track record of reliability
- V. Trusted Advisor
- VI. Driven by Mission and Impact

VI. **Job qualifications:**

- I. Proficient in English writing, reading and oral communication skills
- II. Undergraduate degree in education, business, finance or related experience preferred but not required. Life and professional experience may also be considered
- III. Excellent human relation skills and the ability to effectively work with persons from a broad range of social, economic, cultural and professional backgrounds
- IV. Proficient time management, ability to take initiative and work independently
- V. Effective teamwork both in person and remotely
- VI. Understanding or ability to learn various software including, Windows, Salesforce, Outlook, Zoom, DocuSign, Survey Monkey and Microsoft Office 365
- VII. Willingness to work evenings and Saturdays and maintain a flexible work schedule
- VIII. Attention to detail, highly organized and ability to prioritize
- IX. Ability to perform basic mortgage and budgetary math
- X. Demonstrated passion for Lacasa's mission and ability to relate graciously with co-workers, agency representatives, and clients in a face-paced environment
- XI. Travel may be required, with some overnight stays. This may include daily commutes between Goshen and Elkhart locations as well as out of state training

VII. **Work environment:**

- I. Full-time employee with full benefits available
- II. Assignment to either our Goshen or Elkhart location with a professional office provided
- III. Occasional remote work may be required or offered
- IV. Flexible work schedule that requires some evening and Saturday hours
- V. Salary will be commensurate with the skills and experience of the employee
- VI. Training is provided