

Job Title: Financial Counselor (Bilingual)
FLSA Classification: Non-Exempt/Hourly
Position Status: Full Time
Department: Mission Advancement/Community Empowerment
Supervisory Responsibilities: NA
Reports To: Director of Client Empowerment

Job Purpose

This position equips people to unlock their potential through meaningful delivery (both virtual and in-person, and in English and Spanish) of financial coaching and education, homeownership counseling, and administering of Individual Development Accounts (matched savings) for eligible clients. Lacasa Financial Counselors are at the front line of empowering our community to experience stability and success.

Essential Job Duties and Responsibilities

Service delivery

- Group class instruction for Financial Education classes, including money management, managing debt, credit building, homeownership, and future topics added to the education platform, using a dialogue education style of adult education facilitation.
- Contribute to the development of class curriculum.
- Provide 1:1 financial coaching sessions (in-person and virtual) for clients on a variety of financial topics, providing Individualized Action Plans, Goal Setting, Accountability, and Motivation.
- Provide Homeownership Counseling, including Pre-Purchase Counseling and HUD-approved Homebuyer Education; HUD-certification will be required within 6 months of hire.
- Client account administration including managing and developing Individual Development Accounts (IDA's matched savings accounts) for assigned clients.
- Obtain and maintain necessary certifications for Financial Counselor role as determined and attend continuing education by NeighborWorks America and any other organizational education as instructed.

Record-keeping and reporting

- Enter all client activity data in Client Management Systems.
- Ensure the collection and maintenance of specific information from clients in accordance with all laws and governing organizations, such as, but not limited to the U.S. Department of Housing and Urban Development, NeighborWorks America, and Indiana Housing and Community Development Authority. Program design and changes must be in conformity to these governing bodies.
- Keep files up to date, entering notes in a timely manner, maintaining utmost security of private information of both digital and hard-copy files.
- Be familiar with 9902 and NeighborWorks America quarterly and year-end reports.
- Provide monthly activity reports as needed for Lacasa Board Report.
- Provide data as required for grant writing.

Other expectations

- Be familiar with HUD Handbook and become HUD certified housing counselor within 6 months.
- Adopt National Industry Standards Code of Ethics for Homeownership Professionals.
- Comply fully with training and continuing education requirements.
- Participate in staff meetings and Annual Luncheon.
- Participate in community and professional meetings and training events as directed by supervisor.
- Other duties as assigned.

Qualifications

Education

College degree preferred in education, business, finance, or related field, or equivalent related experience which included exercise of initiative, attention to detail, and independent judgment.

Experience

- Bilingual (English and Spanish) with good written, reading, and oral communication skills.
- Multi-cultural experience preferred.
- Ability to handle sensitive and confidential data with integrity.
- Excellent clerical and computer skills: proficient or advanced skill in Microsoft Suite (Word, Excel, PowerPoint, Teams, and Outlook), Zoom, and experience with data management.
- Records management principles and practices, and research methods and techniques.
- Able to perform basic mortgage and budgetary math. Financial record-keeping and report production.
- Attention to detail and highly organized flexibility in adjusting to shifting priorities.
- Excellent verbal and written communication skills; able to communicate complex ideas simply and succinctly.
- Ability to relate graciously with the public in stressful environments and effectively work with persons from a broad range of social, economic, cultural, and professional backgrounds.
- Self-starter with careful attention to detail and strong sense of initiative and a process-improvement and continuous learning mindset.

Performance Factors

- Respect for others and for Lacasa's mission and core values: **Respect Human Dignity, Work Together, Pursue Excellence, Build to Last**
- Excellent written and verbal communication
- Problem-solving and solution-driven mindset
- Knowledge of Lacasa services, as well as outstanding business acumen and the ability to work with people from varying backgrounds and education levels
- Punctual with the ability to handle schedule flexibility
- Organized with attention to detail
- Quality of work
- Reflects a positive image to staff, clients, and community

Working Conditions

- Some evenings and Saturdays required.
- Able to communicate and exchange information daily.
- Accepts moderate noise (i.e., business office with computers, phone, and printers, light traffic).
- Ability to remain at a computer terminal for an extended period.
- Some local travel required. Must provide a personal vehicle with adequate vehicle liability insurance.

Applicant/Employee Signature

Date