



Job Description

Title: Financial Coach
Department: Financial Opportunity Center
Program: Careers in Manufacturing Programs
Location: JARC Baltimore (4910 Park Heights Ave., Baltimore, MD 21215)

The Jane Addams Resource Corporation (JARC) promotes strong communities, businesses and households to ensure that people who work do not live in poverty.

JARC helps low-income workers, job seekers and community residents attain financial self-sufficiency through skills training and support services. JARC's job training programs target strategic skills gaps in the manufacturing, such as Computer Numerical Control (CNC) machinist and welder. As a Center for Working Families (CWF) and Financial Opportunity Center (FOC), JARC provides bundled financial support services, such as income supports, financial coaching and employment services.

Essential Duties and Responsibilities:

- Provide individual financial counseling and coaching as a part of JARC's financial opportunity center and its broader CWF strategy
- Assess clients' financial situations by reviewing clients' credit reports, tax returns, budgets, balance sheets and other financial documents
 - a. Complete a Combined Financial Assessments (CFA) for every client
 - b. Assist clients in developing realistic spending, savings, and debt management/ reduction plans
 - c. Recommend strategies for clients to establish or reestablish credit and/or increase assets (Retirement, Home, Education, etc.)
 - d. Review and record changes in clients' credit scores, income and net worth to determine whether changes to existing debt management plans, spending plans, or budgets are needed
 - e. Screen clients for public benefits eligibility and assist with public benefits applications as needed
- Maintain physical and digital tracking of client interactions, communications, financial activity, and progress on goal attainment
 - a. Documents outcome tracking through Salesforce, Excel, and other data systems as needed
 - b. Ensures physical and electronic documentation meets grant requirements and organization standards, including strict adherence to client confidentiality
- Negotiate with creditors on behalf of clients to arrange for payment adjustments, interest rate reductions, time extensions, settlements or to set up payment plans
- Facilitate financial education classes and workshops in JARC's Careers in Manufacturing Programs (CMP)
- Develop relationships with local financial institutions, and create and maintain a network of referral organization to assist clients experiencing, bankruptcy, foreclosure, repossession, tax liabilities, civil judgments, etc.

Team Functions:

- Participate on the Employment Services Team

- Assist with required monthly, quarterly, and annual reports
- Write success stories about clients and obtain their feedback on JARC's services
- Comply with all funder requirements
- Other duties as assigned

Identify and refer participants to other resources and services needed to achieve their financial goal.
Identify, cultivate, and maintain relationship with key community partners

Requirements/ Qualifications:

- Two or more years of experience in the financial or credit counseling industry preferred
- Bachelor's Degree preferred
- Able to prioritize organization of hard and electronic files to meet funder requirements and uphold agency's high standards of confidentiality
- The ability to empathize with clients, motivate, and drive positive financial actions.
- Strong written and verbal communication skills
- Intermediate level skills of Microsoft Office and Salesforce preferred
- Experience in workforce development and/ or nonprofit a plus

Terms/ Conditions:

- Full Time (35 hours a week)
- FLSA non-exempt
- Criminal Background, FBI and other pre-employment verifications required
- Must provide proof of legal identity and U.S. employment eligibility

Compensation:

- \$19.23 - \$23.00 per hour
- We offer a competitive benefits package, including Medical, Dental, Vision, 403B, Life, LTD Disability, Paid Holidays, and generous Paid Time Off

**Submit cover letter and resume to hr@jane-addams.org. No phone calls please.
Please include the position title Financial Coach within the subject line. Inquiries without the title in the subject line are not able to be received.**

*Jane Addams Resource Corporation is an Equal Opportunity Employer
Minority/Female/LGBTQ/Gender Identity/ Veteran/Returning Citizen/ Disabled
*All Are Encouraged to Apply**