

FINANCIAL COACH

Boston, MA | Full-Time Salaried

Anti poverty programs in the United States provide critical, but insufficient, support to families with low incomes. Income-based programs provide families with only enough resources to meet day-to-day expenses. If we are to end poverty and narrow gender and racial wealth gaps in our communities, we must do more than provide money to *live by*. Instead, we must support families to grow the financial assets and capabilities needed to achieve the goals and dreams they *live for*.

As a financial coach, you'll share our unwavering belief in people's ability to achieve their goals and dreams. You'll work hand-in-hand with clients to identify, set, and reach important life goals. This is your chance to serve as a positive and encouraging advocate and introduce the key tools and knowledge that can help people to be their best and achieve their dreams.

Beyond sharing financial tips and strategies, you'll connect clients with a unique opportunity to build savings. Over the past ten years, our clients have built over \$6 million in savings through participation in our flagship program.

You'll be the right coach if you have a passion for service and are energized by the opportunity to help others to identify, set, and reach important life goals. You need to bring an interest in personal finance and we will provide the job training needed to perform the work of a financial coach. Later in your training, we give you the opportunity to grow your career by earning a professional credential in financial counseling such as Accredited Financial Counselor. Most importantly, it is your ability to build strong relationships with the women, families, and communities of color that we serve that will help you to excel at this important work.

[Ready to Apply?](#)

WHAT YOU'LL DO

Today, only a small portion of households know about important federal programs that can help families build the assets needed to achieve their dreams and provide a cushion for times of economic distress. As a financial coach, you'll introduce more families to initiatives like the [Family Self-Sufficiency \(FSS\) Program](#) and help them to overcome common barriers to participation.

Your work as a coach will focus on the following key objectives:

- Provide customized in person or phone-based one-on-one financial coaching sessions on topics such as income growth, credit, debt, savings, and long-term asset building
- Serve as a partner and champion as clients set goals and define action plans to achieve short and long-term objectives
- Support clients as they encounter barriers by brainstorming solutions and identifying available expertise and resources
- Identify and connect clients with resources to help meet short-term needs and enable progress towards their long-term goals
- Maintain required records and documentation in a timely manner and in compliance with the organization's data privacy policies

WHO WE'RE LOOKING FOR: BECOMING A COACH

It takes a dedicated person to serve as a financial coach at Compass Working Capital. You'll be tackling one of our nation's greatest challenges, at a personal level, by partnering with members of the community to reach across the opportunity gap that often perpetuates cycles of generational poverty — particularly for women of color.

We do **not** expect candidates to meet all of the criteria listed below. Reviewing the qualifications can help you to better understand what will be expected of you as a member of the coaching team.

- Experience working or volunteering with individuals and/or families with low incomes
- Passion for impacting the lives of others
- Comfort and experience working with computers, software applications, and databases such as Salesforce
- Passion for coaching and mentoring others to achieve challenging goals
- Ability to solicit, receive, and grow from both positive and adjusting feedback
- Commitment to teamwork and collaboration with colleagues from diverse backgrounds
- Ability to build high quality connections with colleagues and community members
- Outstanding communication skills and ability to advocate for your point of view

- Excellent time management skills and ability to prioritize competing priorities in ways that advance high quality outcomes

We are excited to receive applications from candidates who are proficient in more than one language. In particular, we are looking for coaches who speak Haitian-Creole, Amharic, or Spanish.

Experienced Financial Coaches: Applications are welcomed from individuals who have prior experience in financial coaching or financial counseling.

WHAT WE OFFER

As a financial coach you will receive a competitive salary and benefits package. You'll also receive two months of on the job training and the opportunity to obtain accreditation as a financial counselor or certification as a financial planner. Additional employee benefits include:

- Healthcare: medical, dental, vision
- Retirement plan 401(k) & match
- Life insurance & disability Insurance
- Paid time off
- Paid parental leave
- Flexible Spending Account (FSA)
- Dependent Care Flexible Spending Account
- Professional development & certification
- Pre-tax commuter benefits
- Employee Assistance Program (EAP)
- Discounted shopping and entertainment
- Voluntary pet insurance and more

SUBMITTING YOUR APPLICATION

We'll be excited to receive an application from you. Each application will be carefully reviewed and acknowledged by a member of our team.

Interested candidates are encouraged to promptly submit their application through our online portal. We welcome applicants who are based in greater New England, including Massachusetts, Rhode Island, New Hampshire, Vermont, and Maine. While we are currently working remotely, we anticipate asking Coaches to travel our Boston office up to two times/month when we return to our headquarters. Candidates who receive offers will be expected to begin their work with Compass in January 2021.

All applicants will receive a response to their application within two weeks of submission. Please email compass@positivelypartners.org with questions or for support submitting your application.

EQUAL OPPORTUNITY STATEMENT

Compass Working Capital is an Equal Opportunity Employer. We consider applications for all positions, without regard to age, race, color, ethnicity, national origin, ancestry, creed, religion, gender, gender identity or expression, sexual orientation, citizenship, physical or mental disability, medical condition, genetic information, marital status, veteran status, military status, or any other characteristic protected by applicable law.

Compass Working Capital is committed to ensuring individuals with disabilities receive the accommodations required for them to interview for a position on our team. Should you require accommodations, please contact compass@positivelypartners.org.

As a contractor of Boston Housing Authority, Compass also provides hiring preference to Section 3 residents. Section 3 Residency is defined as being an authorized resident of Boston Housing Authority or a "low-income resident" of the Boston Metropolitan Statistical Area, which includes Suffolk, Norfolk, Middlesex, Essex, Plymouth, Strafford (NH), and Rockingham (NH) Counties. For the purposes of Section 3, low-income is defined as 80% of the Area Median Income. To learn more information about Section 3 income eligibility, please refer to [the Housing and Urban Development \(HUD\) Website](#).