Volunteer Financial Coach Job Description

General Description: Volunteer Financial Coaches agree to complete the Tax-Aid Financial Coach Training and provide one-on-one coaching for tax preparation clients who are seeking to accomplish financial goals.

Nature of Position: Volunteers will participate in 10 hours of in person curriculum training in the financial coach process, basic money management, strategies for dealing with financial problems, credit and debt management, savings, coaching and goal setting techniques, and community resources. Some homework will be required. Following the training, each volunteer agrees to provide volunteer financial coaching with at least one client within two months of completion of training. The volunteer coach attends a minimum of three monthly learning labs to complete their training. The learning labs are trainer-facilitated meetings to practice skills, share updates, challenges and successes with other coaches.

Responsibilities:

- Assist individuals and families analyze their financial situation and generate goals and action strategies to create financial resiliency by creating a habit of saving and an understanding of the importance and impact of credit.
- Practice effective communication and goal setting/coaching skills to interact with clients in an empowering manner.
- Understand the uniqueness of an individual's attitudes, beliefs, and values regarding money.
- Be familiar with a variety of financial coaching tools and community resources that may be useful to clients.
- Complete activity and contact reports and return them to Tax-Aid.
- Attend Learning Labs (three minimum).

Qualifications:

- Ability to work with individuals in a respectful and nonjudgmental manner.
- Good communication and interpersonal skills.
- Sensitivity to and respect for individual differences.
- Ability to maintain participant confidentiality and trust.
- Able to volunteer to provide financial coaching for at least one client after the completion of training and commit to working with that client for six months.
- Ability to attend two 5 hour training sessions and a minimum of three 2 hour Learning Labs.
- Commitment to follow Tax-Aid's financial coaching process.

Benefits:

- Receive up-to-date training and materials on financial management.
- Further professional development increasing client communication skills and deepening understanding of behavioral finance.
- Learn and build new skills.
- Become a member of a working team providing a valuable service to households in the community.
- Learn about and practice proven techniques to help people change financial behaviors