

Job Title: Financial Coach Boston, MA

Are you looking for a mission driven organization that believes in people and their ability to achieve their goals and dreams? Do you want to be part of a team that is focused on impact and innovation? If so, look no further than Compass Working Capital (“Compass”). Compass is a leading, nonprofit financial services organization that supports families with low incomes to build assets and financial capabilities as a pathway to economic mobility and financial security.

We are looking for mission-driven, results-oriented, and collaborative individuals to join our growing team of Financial Coaches. Financial Coaches deliver one-on-one financial coaching and guidance to Compass clients. Coaches support families to set and reach financial goals including, budgeting increasing income, building credit, buying a home, starting a business, pursuing postsecondary education, or saving for children’s education.

The start date for this position is in early October 2019.

Our Financial Coaches embody our values

- **Believe in People:** At Compass, we have a fundamental belief in all clients and their ability to achieve their goals and dreams. Our unique approach to coaching fosters a culture of aspiration, dignity, and hope.
- **Pursue Excellence:** We hold ourselves to the highest professional and ethical standards in every aspect of our work, and we strive to always do better.
- **Go Further Together:** Our team builds trust, respects each other, and acts with care and empathy. We believe in harnessing our strengths to find joy in what we do, in doing this work as a team and bringing out the best in each other.

Primary Responsibilities

- Provide ongoing, customized one-on-one financial coaching and guidance to Compass clients across five core areas: income growth, credit, debt, savings, and long-term asset building.
- Work with clients to set goals and to establish shorter-term action steps to help reach those larger goals. Be a partner, a champion, and a support to clients throughout their journey in the program.
- Provide referrals for resources and services to help clients reach their goals.
- Record client information and progress data precisely, accurately, and on time, with a rigorous dedication to confidentiality and data security protocols.
- Maintain knowledge about basic elements of the organization’s core FSS program.

Required Qualifications and Skills

- Belief in all clients and their ability to achieve their goals and dreams.
- Interest in learning about and building a proficiency in personal and consumer finance issues, particularly those relating to families with low incomes. A prior background in personal finance is not required for this role as training and certification in personal finance will be provided.
- Cultural humility. Openness to and respect for others’ cultures, identities, and lived experiences.
- Commitment to Compass’ mission and passion for working with families with low incomes
- Trustworthy, with strong interpersonal skills. Maturity, self-awareness, empathy, integrity, sound judgment, and ability to establish and build strong, trusting partnerships with clients.

- Excellent organizational skills. Detail-oriented with the ability to complete work accurately and efficiently.
- Excellent written and verbal communication skills, including ability to explain complex information in plain language.

Preferred Qualifications & Skills

- Prior experience working with low-income families and communities
- Prior experience providing coaching
- Professional experience, education, or certification in finance (e.g. AFC, CFP)
- Bachelor's Degree or comparable education and work experience
- Proficiency or fluency in Haitian-Creole, Amharic, or Spanish.

This job description is not intended to provide a comprehensive listing of all duties or responsibilities. Job duties and responsibilities may change at any time based on coaching methods and program partners.

Additional Information

This position is based in Boston, MA and will be supporting clients in our Boston programs. Required hours could include a combination of workday, evening and weekend hours to accommodate the needs of our clients. Occasional travel to other Compass offices (Lynn, MA) and other communities may be required as our programs grow and broaden geographically. To apply, please submit a resume and a cover letter that outlines your interest in this role [via this link](#).

Compass is an equal opportunity employer and committed to hiring individuals who reflect the diversity of the communities it serves.

Compass, as a contractor of Boston Housing Authority, 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 as 80% of the Area Median Income. To learn more information about Section 3 income eligibility, check out this page on [the Housing and Urban Development \(HUD\) Website](#).

For more information, please visit us on our website, www.compassworkingcapital.org or find us on social media: [Facebook](#) | [Twitter](#) | [LinkedIn](#)