



## CHINESE COMMUNITY CENTER

a multi-ethnic organization serving all Houstonians

休士頓中華文化服務中心

9800 Town Park Drive  
Houston, Texas 77036  
[www.ccchouston.org](http://www.ccchouston.org)  
Ph: (713) 271-6100  
Fax: (713) 271-3713

### Financial Coach JOB DESCRIPTION

#### Position Description and Responsibilities:

The Financial Coach position offers a unique opportunity for a highly motivated individual to work in a growth-oriented program, Financial Opportunity Center (FOC) that is dedicated to helping low to moderate income families change financial behavior, build assets and become financially stable. FOC provides individualized financial coaching for participants to help them reach target goals including credit score; budgeting; saving; utilization of quality financial services; and asset development. The Financial Coach will work directly with families/individuals in our FOC program to ensure that families reach their educational, financial, and asset goals.

#### Primary areas of responsibility:

- **Financial coaching:** Provide one-on-one coaching for participants in CCC's FOC program. Assist participants with goal setting, budgeting, credit building/rebuilding, debt repayment, savings, utilization for quality financial services, and asset development. Monitor participant progress toward financial goals. Follow up with participants on referrals to other financial service professionals when applicable. Maintains files and database for all participants including the intake form, credit report, coach's appointment notes, analysis and corrective action plan.
- **Financial education classes/workshops:** Develop and conduct financial education classes. Oversee participant performance at onsite financial education classes.
- **Data collection and evaluation:** Collect and verify all required data from participants throughout the program, including Combined Financial Assessment and Financial Profile. Assist in program reports preparation
- **Resource development:** Identify and refer participants to other resources and services needed to achieve their financial goal. Identify, cultivate, and maintain relationship with key community partners.
- **General program support:** Provide support, as needed, to other core programs including cross-training in other service areas. Assists with special projects as assigned and other tasks deemed necessary to achieve overall goals and to operate a successful program.
- **Policy and Guidelines:** Adheres to all guidelines related to confidentiality. Follow regulatory and quality-control requirements. Works to ensure that satisfaction is a priority of the coaching program.
- **Travel:** Travel for training and occasional meeting as needed.
- **Maintain a flexible work schedule as needed.**

## **Experience and Qualifications:**

**Education:** Bachelors Degree

**Financial services expertise:** The applicant should have a background in financial coaching, banking, asset development and/or a related economic development field. The applicant should have experience working with low-income families in one or more of the following areas: financial goal setting; budgeting; credit building/rebuilding and debt repayment; utilization of quality financial services; and asset development.

**Skills:** Excellent interpersonal, written and verbal communication skills. Demonstrate organizational skills, with the ability to handle multi-tasking. Knowledge of Microsoft Office software. Proficiency in Chinese is a plus.

## **Personal Qualities:**

- Highly motivated self-starter
- Demonstrates ability to interact effectively and confidently with individuals at all social and economic levels that utilize or support CCC/FOC services.
- Ability to work independently and as a productive team member.
- Flexible, adaptive and positive in a constantly changing environment
- Detail-oriented, with a willingness to learn new skills and techniques to promote quality, efficiency and successful customer outcomes.
- Ability to identify internal weaknesses, identify solutions, and to adapt coaching methods and tools to create more effective organizational and client outcomes.
- Ability to sense when clients are overwhelmed and to break major objectives in manageable steps.
- Dedicated individual to engage/motivate/encourage customers and help them resolve financial challenges and accomplish goals.
- Creative, practical and strategic problem solving skills

## **Hours/Salary:**

Full Time position with benefits, Salary commensurate with experience

## **How to Apply:**

To apply, mail or email a resume and letter of interest to:

Kimberly Tang  
Financial Opportunity Center Program Manager  
Chinese Community Center  
9800 Town Park Drive  
Houston, Texas 77036  
E-mail: ktang@ccchouston.org

**Opening Date:** Immediate  
**Closing Date:** Open until filled.