



# ADVANCING TOGETHER

110 Bartholomew Ave Ste 3050, Hartford CT 06106 • T 860-247-2437 • F 860-951-4779 • act-ct.org

**Title:** Financial Coach

**Employment Status:** Part-Time, 20 hrs.

**Salary:** \$21/hr

**Reports to:** CMS/FC Program Manager

## **Summary**

The Connecticut Association for Human Services Financial Coaching program connects low to moderate income adults with trained financial volunteer coaches who assist adults with creating and implementing a financial plan for economic success.

## **Responsibilities**

Duties shall include, but are not limited to:

- Assess client needs and support client-identified goals through monthly sessions
- Make appropriate referrals and integrate other wraparound supports (i.e. benefits, tax preparation) into counseling to achieve greater results;
- Maintain full caseload & engage in ongoing follow-up with clients;
- Collect, track and report required data using Google Drive Suite
- Participate in initial trainings and ongoing professional development trainings;
- Follow required protocol and program requirements

## **Qualification Requirements**

- Particular expertise in one of the following: financial services, social work, financial planning, coaching/mentoring, teaching, or other related fields is preferred

## **Essential Skills**

- Be knowledgeable about credit, debt, and money management; savings and investment options; and safe financial products and services;
- Excellent working knowledge of Microsoft Word, Excel, Outlook;
- Available to work some evenings and weekends;
- Ideally bilingual, speaking English as well as Spanish.
- Excellent interpersonal skills;
- Knowledge of Motivational Interviewing or behavior modification techniques a plus
- Eastern Connecticut resident preferred

## **Location**

- Hybrid- Remote & Office

## **What we offer employees:**

- Dedicated, diverse, and friendly co-workers
- Generous paid time off
- 100% paid short-term/long-term/life insurance
- 403(b) retirement plan with employer match of 100% up to 3% of pay

## **How to Apply**

Please send your resume and cover letter expressing interest in our mission to [apply@act-ct.org](mailto:apply@act-ct.org) with “Financial Coaching Program Coordinator” in the subject line. Candidates without a cover letter will not be considered. Candidates will be considered on a rolling basis until the position is filled. Due to the anticipated volume of responses, we will contact only those top candidates who most closely match our requirements.

*ACT celebrates diversity and inclusion and is an Equal Employment Opportunity/Affirmative Action employer.*