

# FEC FINANCIAL COUNSELOR

The Financial Empowerment Center program aims to improve the financial stability of City of Aurora households by providing high-quality, one-on-one financial education and counseling to low-income residents. Empowerment Centers are located in areas with high concentrations of poverty and financial distress.

The Aurora Financial Empowerment Center (FEC) is a public/private partnership between the City of Aurora and The Neighbor Project designed to break long-standing cycles of poverty and empower Aurora residents to be the primary drivers of neighborhood revitalization & community growth. The FEC aims to improve the financial stability of Aurora households by providing high-quality, one-on-one financial education and coaching for low-moderate income residents. FEC counselors will help clients work to reduce debt, improve credit, open bank accounts, establish savings and ultimately develop plans focused on continuing a pathway to financial stability and asset creation (such as homeownership, entrepreneurship, job training or higher education).

The FEC Counselor's primary purpose is to provide financial counseling, education, and support to individuals and families. The individual in this position will go through comprehensive financial counselor training and help clients manage their finances and achieve their financial goals. The FEC Counselor will develop a rapport with the individuals they are working with and will provide case management and community referrals as necessary to help them become financially independent. It is expected that the FEC Counselor will focus services in a culturally competent, one-on-one counseling format.

The FEC Counselor will report directly to the Financial Empowerment Center Program Manager.

## **Responsibilities**

Duties shall include, but are not limited to:

- Assess client needs and develop individualized goals and service plans with each client;
- Provide one-on-one financial counseling sessions (including both initial and follow-up sessions) to achieve client outcomes;

- Make appropriate community referrals and integrate other wrap-around supports (e.g., benefits, tax preparation, and legal services) into counseling to achieve greater results;
- Engage in ongoing follow-up with clients.
- Collect, track, and report required data using a client management database;
- Document case and summary notes
- Successfully complete and pass counselor trainings for certification.
- Support the creation of new workshops in homeownership, budgeting, banking, and credit;
- Participate in initial trainings and ongoing professional development trainings as directed;
- Follow required protocol and program requirements;

### **Other Responsibilities**

- Attend FEC departmental, and staff meetings
- Attend community events and/or FEC/TNP events. Events may be in the evenings or weekends
- Maintain professional relationships with network referral partners
- Prioritizing the confidentiality of TNP/FEC client information
- Update FEC content knowledge by participating in educational and professional opportunities and maintaining networks
- Perform other FEC related duties as assigned by FEC Manager

### **Qualification Requirements**

- A baccalaureate degree from an accredited college and two years of experience of relevant work experience with some background in finance, financial education, counseling/coaching, or social service delivery;
- Particular expertise in one of the following: financial services, social work, financial planning, coaching/mentoring, teaching, or other related fields.

### **Essential Skills**

- Ideally bilingual, speaking English as well as Spanish;
- Be knowledgeable about credit, debt, and money management; savings and investment options; and safe financial products and services;
- Dynamic, committed individual with strong interpersonal skills and a passion for supporting people with low incomes to build greater financial stability;
- Solid organizational skills with the ability to juggle multiple tasks, set priorities, effectively manage time, and meet deadlines;
- Excellent writing and verbal communication abilities;
- Demonstrated success in program coordination and achieving programmatic goals and outcomes;
- Highly organized self-starter with demonstrated success in managing multiple and diverse priorities, as well as balancing competing deadlines and projects;
- Strong computer skills: Microsoft Word, Excel, PowerPoint, and Outlook; and
- Attention to detail and production of quality work, along with the ability to work quickly and under pressure.
- Excellent interpersonal skills: the ability to work effectively with partners and colleagues in a cross-cultural, multi-disciplinary environment,
- Excellent working knowledge of Microsoft Word, Excel, Outlook;
- Available to work some evenings and weekends;
- Ability to use a client management database.
- Public speaking;
- Self-directed learning;
- Ability to work independently with minimum supervision and as part of a high-performing team;
- Willingness to work a non-standard work schedule, including as needed (evenings and weekends);
- Organized, able to prioritize, strategically plans, and meets deadlines;
- Demonstrated ability to collaborate with staff, community partners, stakeholders, volunteers, and clients;
- Strong interpersonal and conflict management skills;
- Strong verbal and written communication skills;

- Critical thinking skills; and
- Commitment to excellence and passion for the mission of the FEC.

**Physical/Other Requirements:**

- Position is primarily a normal office setting, requiring long periods of sedentary work at a desk and computer;
- Minimal lifting up to 30 pounds occasionally;
- After-hours event attendance occasionally;
- Ability to travel throughout the service delivery (via a personal, insured vehicle or via public transportation); and
- Work hours that may be outside of the standard workday (e.g., Saturdays or until 8:00pm).