



Job Title: SFC Certified Financial Counselor

FLSA Status: Non-Exempt

Supervisor: Financial Management and Education Director

Direct Reports: NA

Minimum Qualifications: Bachelors Degree or five years' experience in a financial field. Strong computer skills, proficiency in Microsoft Office. Position requires ability to work harmoniously with staff; strong problem solving skills; excellent organization and time management skills; excellent communication skills; ability to relate and maintain professional relationships with businesses, social service agencies, creditors, and clients. Must be able to recognize and control biases and refrain from making judgments. Credit Counseling certification must be obtained within 6 months of hire. Housing, HUD, Reverse Mortgage, SHIP, Information and Options, and Student Loan Counseling certifications required as soon as possible thereafter (within 24 months of hire).

Preferred Qualifications: Business or related degree and two years satisfactory work experience in credit, finance, financial counseling, or other related experience

Primary Role

Provide Financial Counseling/Education on money management and Default Housing Counseling to individuals and families. Provide an Action Plan with options, including DMP and budgeting information, to resolve financial concerns.

Responsibilities

- Provide financial, credit, housing, crisis and advocacy counseling to clients, offering options to deal with financial concerns, including DMP and budgeting.
- Deliver services by interviewing, analyzing, and investigating client's financial situation in relation to available options.
- Assure quality services by being knowledgeable of rules, regulations, and legal requirements
- Assure timely follow-up of clients, including returning phone calls within 1 business day.
- Adhere to policies and procedures relating to client file maintenance and documentation. Maintain records necessary for programming and accountability.
- Contribute to the effectiveness of the profession by maintaining active interest in the field, consulting, and advocating for change.
- When called upon, provide educational presentations to interested groups and individuals.
- With prior approval of the supervisor, participate in radio programs and other outreach opportunities when possible.
- Be sensitive to the needs and circumstances of the client, and respect diversity among cultures, gender, age, etc.
- Abide by the Counselor Certification requirements of the National Foundation for Credit Counseling and HUD. Maintain such certification.



- Provide case consultation with other counselors as needed.
- Meet regularly with supervisor regarding responsibilities, and share concerns or suggestions.
- Serve on the Quality Assurance Team. Attend and participate in department and organization meetings as required.
- Other duties as the supervisor deems necessary.

Agency Responsibilities

- Adhere to established agency values, policies and procedures, and agency handbook guidelines.
- Promote a positive image of the agency by demonstrating an understanding of the services available and conducting oneself according to a professional code of ethics.
- Maintain harmonious working relationships with agency staff, United Way, educators, business associates, and other related service agencies by amenable and cooperative contacts.
- Assure confidentiality of information related to clients and other information of a confidential nature as established by the standards of the Council of Accreditation for Services to Families & Children (COA).
- Maintain active professional competency by participating in training and workshops for professional growth in areas pertaining to duties. Maintain certifications required to perform the duties of the job. Obtain new certifications as needed for the job in a timely manner as established by policies of the organization.

Equipment Used: Telephone, copier, computer, MS Office

Working Conditions: General office environment

Physical and Mental Requirements

- Frequent: sitting, writing, reading, problem solving, planning, decision making, organizing, interpreting data
- Often: standing, walking

Employee Signature

Date