**MISSION ECONOMIC DEVELOPMENT AGENCY**

**JOB DESCRIPTION**

**Position: Financial Assets Coach**

**AGENCY OVERVIEW**

**Mission Economic Development Agency (MEDA) -** Rooted in the Mission and focused on San Francisco, MEDA’s mission is to strengthen low- and moderate-income Latino families by promoting economic equity and social justice through asset building and community development.

MEDA is advancing strategies to create asset building opportunities for San Francisco’s Latino families and in the Mission District through: (1) our core, integrated Asset Building Programs related to financial capability, housing, workforce development, business development and tax preparation; (2) serving as a backbone agency to advance educational achievement and family economic success through the Promise Neighborhoods 2-generation approach; (3) creating and preserving affordable housing and commercial real estate in the Mission District through Community Real Estate; (4) providing access to capital and innovative financial products through the Adelante Fund; and (5) Policy & Advocacy efforts that support our mission.

**POSITION OVERVIEW**

The Financial Assets Coach will be responsible for working with low- and moderate- income San Francisco households, focusing predominantly on the Latino community to increase financial capability education and provide financial coaching services. MEDA’s Financial Capability model includes workshops and one-on-one coaching specifically relating to safe banking and DISC (Debt, Income, Savings & Credit). The Coach is responsible for workshop facilitation, one-one-one coaching, and connecting clients to other services and products to best support them reaching their asset building goals. The Coach is responsible for completing financial assessments, goal setting, and action plans with clients and providing at minimum quarterly follow-up. This position will work closely with the Financial Capability team, as well as with all other Asset Building programs and staff. This position will also work with the Mission Promise Neighborhood network and Community Real Estate team to provide financial capability services to families in the networks and residents of MEDA-owned or managed housing developments.

* Provide accurate, relevant and helpful information in English and/or Spanish to assist clients with financial capability education and coaching at MEDA and partner sites.
* Facilitate Welcome Orientation and Financial Education Workshops, in Spanish and/or English.
* Assess clients’ financial situation based on review of credit report, individual, and household budget: income, assets and expenses.
* Assist clients in preparing a financial capability plan based on recommended modified budget scenarios, public benefits, and financial product connections.
* Help prepare and run MEDA’s low income tax program during tax season.
* Assist clients with tax preparation and ITIN application
* Assist clients in preparing for other asset building services such as workforce and/or business development to increase income, housing- search and application assistance & mortgage and rental readiness.
* Assist in the maintenance of the program’s database, including timely and accurate data collection, input and program reporting.
* Assist in the preparation of workshop materials, mailings, fliers and other outreach and marketing materials for the Financial Capability program.
* Assist in new curriculum development and existing curriculum refinement.
* Represent the organization in various community forums.
* Participate in advocacy for asset building opportunities in San Francisco.
* Work collaboratively with the fund development staff in gathering data for funder reports, and assist with funding and grant writing efforts as requested

**QUALIFICATIONS**

* Minimum of Bachelors’ Degree, or equivalent experience required.
* 2-3 years of financial coaching experience preferred
* **Spanish fluency required. Must be able to read and write in Spanish.**

**KNOWLEDGE, SKILLS AND ABILITIES**

* Excellent verbal communication, presentation skills, and customer service.
* Professional or personal experience working with low and moderate income and immigrant communities required.
* Excellent writing and computer skills including word processing and use of database systems.
* Strong interpersonal skills required.
* Experience in personal financial education and coaching in an integrated services setting preferred.
* Must be available to work outside regular business hours (evenings and weekends).
* Financial Coaching certification a plus.
* Salesforce experience a plus.
* Previous experience in a VITA Site a plus

**TO APPLY**

Click on the following link and complete the application form.

<https://medasf.bamboohr.com/jobs/view.php?id=39>