Title: Financial Coach


Salary: $21/hr

Reports to: CMS/FC Program Manager

Summary

This position is staffed through the Connecticut Association for Human Services, a division of Advancing Connecticut Together (ACT). The 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

• A baccalaureate degree from an accredited college.
• 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 interpersonal skills;
• Excellent working knowledge of Microsoft Word, Excel, Outlook;
• Available to work some evenings and weekends;
• Ideally bilingual, speaking English as well as Spanish.
• 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 Coach” 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.*