

Midtown Partners, Inc./ The Prosperity Center of Greater Jackson

Position title:

Financial Counselor/Financial Services Coordinator

Reporting to:

Program Director

Summary:

Coordinates and provides financial counseling services to low- and moderate-income individuals and families enrolled in the Prosperity Center and other Midtown Partners programs through one-on-one coaching, workshops and community outreach. The counselor will promote the awareness of basic financial literacy and provide comprehensive financial assessments including but not limited to personal financial counseling, debt management, credit report review, housing counseling and other skills needed to achieve participant financial goals and reach economic independence.

Essential Duties and Responsibilities:

- Meet one-on-one with all participants to provide a comprehensive financial assessment and establish individual financial goal action plans that support the individual or family goal for each participant.
- Monitor plan progress and work with Prosperity Center staff to develop, organize and coordinate financial services that are responsive to individual or family needs.
- Counsel and coach participants on personal and family financial problems to include review of credit reports, excessive spending and borrowing of funds and provide professional advice on how to address their financial challenges.
- Conduct weekly financial education workshops for participants to enhance their basic financial literacy skills, covering areas such as money management, budgeting, credit, EITC and asset building.
- Create and maintain a learning environment that is conducive for adult learning, enhancing the curriculum as needed to incorporate speakers, experiential learning, field trips, etc.
- Develop methods to measure participant competency of curriculum units/lessons used to show progress towards goals and objectives.
- Maintain participant attendance data and submit weekly time sheets and other required documentation to MDHS case management staff as needed and/or requested.
- Conduct community outreach to provide financial education workshops at designated companies and organizations (i.e.; employers, churches, schools) to reach target client base of the Prosperity Center.
- Seek out opportunities for partnerships and collaboration that will raise awareness of program, enhance services and create new opportunities for participants and staff.
- Manage the Volunteer Income Tax Assistance (VITA) site operations, including recruitment of tax filers, scheduling, tax preparation, and achieving certification in accordance with the IRS VITA Site Coordinator's Handbook.
- Provide basic financial literacy workshops for youth enrolled in Project Innovation making adjustments as necessary for age appropriate learning experiences.
- Conduct workshops and seminars for seniors participating in the Midtown Partner's Senior Program.
- Assist director in the development of outcome measures, and policies and procedures and recommend program enhancements that are responsive to consumer needs.
- Presents a positive, professional image to the community.
- Other duties as assigned by Program Director.

Minimum Requirements:

- Proficiency in Microsoft Office to include Word, Excel, PowerPoint and Publisher.
- Experience in conducting group workshops/training and able to use creativity and enthusiasm to motivate adults and tailor learning activities to meet group and or individual needs.

- Effective interpersonal skills and excellent verbal and written communication skills.
- Ability to meet deadlines and work independently as well in a team environment
- Experience working with people from a variety of cultural and economic backgrounds.
- Ability to work with challenging individuals and situations a must
- Strong problem solving and group work leadership skills
- Resourceful in referring clients to additional services.
- Desire to work in a community-based, consumer oriented environment a must
- Flexible work schedule required; may include some evenings and weekends.

Education and/or Experience:

Bachelor's degree (B.A.) in finance, business, accounting or related field is required. At least five years of related experience and working knowledge of budgeting, banking procedures and saving and investing. Certification in financial planning or credit counseling an added benefit, but not required. Securities license 6, 63, or 7 and insurance license are a plus. Must have satisfactory credit.

Please submit cover letter and resume to:

Ellen Collins, Director
The Prosperity Center
215 McTyere Avenue
Jackson, MS 39202
601.355.5536 ext.106

You may email your information to: ellencollins@midtownpartners.org