Financial Coach

Location: Washington, DC

Position Summary: The Financial Coach is responsible for the delivery of financial education classes and one-on-one financial coaching sessions, client support, and account management.

Responsibilities

- Teach CAAB's financial education classes.
- Present Program Presentation and materials to CAAB stakeholders.
- Compile financial education training materials for classes' and coaching onsite and offsite.
- Provide case management for clients participating in financial education and matched savings programs.
- Work with CAAB staff to develop and distribute outreach and marketing materials for CAAB's programs, including providing descriptions and distributing materials to target outreach populations.
- Enter critical client data into CAAB database system(s).
- Connect enrolled savers to CAAB's other areas of work and other resources as appropriate.
- Other duties as assigned.

Requirements

- Experience with working with low- and moderate-income individuals and families
- Cultural understanding and awareness of socio-economic matters in the Washington metropolitan region
- Possess at least an Associate's Degree (AA)
- Proficiency in Microsoft Office

Interested in Applying? Please submit your resume with a letterhead to hr@caab.org.

About CAAB

Capital Area Asset Builders (CAAB) is a Washington, DC-based non-profit organization whose mission is to create opportunities for low- and moderate-income individuals in the greater DC region to build financial security, savings, and wealth for the future. More information at www.caab.org.