

### **About Neighborhood Trust**

Neighborhood Trust is a national nonprofit social enterprise and marketplace innovator creating solutions to better meet the financial needs of low wage workers. Our solutions are designed to create high-impact, systemic change by directly serving both individuals and institutions. We help workers eliminate and avoid debt, which enables them to build savings, escape the vicious cycle of living paycheck to paycheck and assert control over their financial lives. For over 25 years, we've worked side by side with workers, collected vast data and qualitative insights about the financial challenges they face, and built strategic partnerships across the financial services ecosystem.

In 2006, Neighborhood Trust - known then as Credit Where Credit Is Due - became one of the first organizations to join New York City's Financial Empowerment Center Program network to bring financial coaching services to City residents. It's a program we've maintained since its launch and currently work closely with the New York City Office of Financial Empowerment (OFE) to administer.

### **About Your Role**

Financial Coaches provide one-on-one coaching through the Financial Empowerment Center Program and are based out of community organizations throughout New York City. Financial Coaches work with a high degree of independence, being embedded within different community-based partner sites for the majority of their time. In this role, you will primarily provide our financial coaching services in an in-person setting based out of our Staten Island partner sites. You will also periodically travel to our headquarters located in the Washington Heights neighborhood of Manhattan to engage with other Financial Coaches as part of additional professional development or as deemed necessary by the organization.

In addition to individualized coaching sessions, some Financial Coaches may also deliver presentations at partner—or remotely—on relevant topics of interest to our client population. You may also engage in outreach activities to promote our coaching services in the Financial Empowerment Center Program.

### **Your Responsibilities:**

As part of an innovative and dynamic organization, the position is actively evolving and responsibilities change as services are refined and new partnerships develop. The following are responsibilities assigned to Financial Coaches depending on details of work assignment:

- Work directly with Financial Empowerment Center clients to provide high-quality financial coaching—including the delivery of personalized Action Plans
- Provide ongoing support and continue to actively engage Financial Empowerment Center program participants to promote their financial health
- Document services and gather session data for program reporting and evaluation in the City's Financial Empowerment Management System database
- Achieve program goals for client impact and service outputs, taking initiative with client outreach
- Deliver brief and persuasive presentations on our services to potential clients or referring partners
- Participate in regular team meetings and continued skill-building training sessions

### **Administrative:**

- Ensure all data is entered accurately and follows applicable program guidelines as established by the Financial Empowerment Center Program
- In this direct services role, you must be vaccinated against the COVID-19 virus and comply with all our health and safety procedures

### **What You Bring:**

- Alignment with core [organizational values](#)
- Fluency in Spanish and English
- Excellent teaching and facilitation skills
- Bachelor's degree preferred, but not required
- You must be committed to taking and passing the City University of New York (CUNY) Personal Finance Course, as mandated by OFE, and at no additional cost to you.

- You are flexible, take initiative, and embrace the opportunity to work within various settings, largely serving as the face of Neighborhood Trust at our Staten Island partner sites

**Position Details:**

- Status: Full-time, non-exempt
- Reports to: Associate Director of Programs
- Location: You will work primarily out of community-based organizations in Staten Island that host our services. There may be an occasional opportunity for remote work and, periodically, you will be asked to attend meetings and other events at our main office in Washington Heights.

**Compensation and Benefits Package:**

- Salary: \$50,000 annually
- 100% employer-paid medical, dental and vision premiums for employees (savings of \$6K - \$10K per year)
- Eligible for 401(k) participation immediately, with up to a \$1K per year in employer match, vested immediately
- 12 weeks paid family leave for full-time employees, with schedule flexibility upon return to work for eligible employees
- Generous paid time off per year— 12 paid holidays, 15 vacation days (grows with tenure), 6 personal/sick leave days, 1 civic engagement day
- Access to Health Flexible Spending Account, Dependent Care Flexible Spending Account, Life Insurance, and long-term and short-term disability plans

**To Apply:**

We are committed to building a diverse and inclusive workplace that reflects the diversity of our clients. We especially seek applicants with lived experiences of financial hardship or systemic exclusion. Staff from all backgrounds can contribute meaningfully to our mission, and we recognize that those who come from the communities we serve have a uniquely powerful perspective.

Please send resume and cover letter to [epichardo@neighborhoodtrust.org](mailto:epichardo@neighborhoodtrust.org) with the subject line "Financial Coach - Staten Island".



*Neighborhood Trust is an equal opportunity employer and we are committed to equal employment opportunity in all decisions related to employment, promotion, wages, benefits and all other privileges, terms and conditions of employment.*