HOPE Personal Financial Coach
Job Description

HOPE (Helping Ourselves to Prosper Economically) is a **Financial Coaching Program** offered by Housing and Credit Counseling, Inc. (HCCI) and United Way of Greater Topeka. The program is designed for working families and individuals who want to move beyond living paycheck to paycheck to achieve their financial goals.

Why is coaching important?
A financial coach focuses on the person, in his or her own unique situation, rather than merely providing information. A coach serves as a mentor and a guide, helping individuals access the tools and resources that will empower them to reach their goals. HOPE Program statistics show people succeed when they work with coaches.

Families/individuals participating in the program:
➢ 100% created a spending plan

➢ 60% paid down approximately 30% of their debt

➢ 65% saved money, many for the first time

Financial Coach Requirements/Qualifications:
➢ Accepts people where they are in their life without judgment

➢ Listens to others and communicates effectively

➢ Willing to commit time to work with assigned family/individual

Financial Coach Duties/Responsibilities:

➢ Responsible for meeting with the assigned mentee for the agreed upon time frame (i.e., regular meetings for a minimum of 6 months, possible up to one year)

➢ Work closely with HCCI staff through phone contact, personal conferences and group meetings

➢ Accept individuals who may not share the coach's lifestyle and values

➢ Respect the mentee's right to self-determination and independence

➢ Honor an ethical code not to promote any specific companies' financial products or services while coaching

➢ Will not discuss personal information shared by participants with persons other than the assigned HCCI Staff Counselor or Program Director.

➢ Will collect and report outcomes documentation as requested by HCCI

Matching Process:
Matches will be made based on interests, skills, background, knowledge, temperament and availability of both the individual(s) and the coach.