



VOLUNTEER JOB DESCRIPTION



POSITION: Budget Coach

REPORTS TO: Manager, Valley Assistance Network

LOCATION: 411 N. Cameron St. Suite 210 Winchester, VA 22601

PURPOSE: The Budget Coach provides one-on-one financial counseling to individuals and families. They help establish goals and then recommend basic skills, habits and practices to improve their financial situation. The volunteer will also further evaluate potential candidates for the more comprehensive Pathways Program.

DUTIES:

- Conducts one-on-one financial counseling sessions to empower individuals to manage their income and expense and prioritize bills
- Inspires clients to reach goals, using both motivation and application of budgeting skills
- Documents and follows up to track individual progress
- Builds rapport with clients to cultivate trust and engagement
- Refers clients to community resources to obtain additional assistance
- Evaluates client progress to further recommend them to Pathways programs or community partners
- Helps develop and assist with recruitment for budgeting and renter's education classes

QUALIFICATIONS/SKILLS REQUIRED

- Education, life and/or work experience
- Empathetic communication skills
- A strong understanding of, and personal experience practicing, balanced personal finances
- The ability to relate and empathize with clients in crisis
- Possess an understanding of the dynamics of poverty, as well as an understanding of, and sensitivity to, serving diverse populations
- Budget creation and management
- Genuine desire to help people to achieve their goals
- Flexible and patient attitude of understanding towards scheduling difficulties of crisis clients
- Professional experience in any sector of the financial industry is a plus, but not required
- Master Financial Education Volunteer Training from the Virginia Cooperative Extension (VCE) is a plus, but not required
- Association for Financial Counseling and Planning Education (AFCPE) Certification is a plus, but not required

TIME COMMITMENT: Volunteers are asked to commit to one day a week to work remotely or from the Valley Assistance Network office. We are extremely flexible with scheduling changes and special timeframes within our hours (Monday to Friday, 9AM-5PM).

CONTACT: Please contact Jennifer Hall at (540) 773-3178 or Jhall@unitedwaynsv.org for more information.