

EXAMPLE FINANCIAL COACH RESPONSIBILITIES & COMPETENCIES



This is an example of possible responsibilities and competency areas for a Financial Coach at a SparkPoint Center. This is not meant to be an exhaustive list and not all the items on this list may be applicable to all Financial Coaches. These should be adapted based on the needs of your SparkPoint Center and institutional context.

EXAMPLE RESPONSIBILITIES:

- Provides individualized Family-Centered Coaching to community members supporting their work toward their financial goals
- Refers clients to resources and services they may qualify for to meet their unique needs
- Helps prospective clients navigate the enrollment process, including intake assessment, orientation attendance, welcome packet completion, and appointment scheduling
- Conducts timely follow-up, tracks progress toward short- and long-term goals, and celebrates successes with clients
- Exchanges information with clients, staff, other social service agencies, community and business representatives, governmental agencies, and the general public regarding SparkPoint services, including eligibility requirements, required forms, etc.
- Maintains a library of materials and online resources related to financial literacy and community resources
- Maintains orderly and confidential client files and documentation, including detailed case notes, client goals and service plan, referrals, and follow-up assessments
- Records all services and assessments completely and accurately into the SparkPoint database
- Trains incoming staff and volunteer coaches by providing opportunities to shadow client appointments and share best practices for coaching and data entry
- Participates in required trainings and meetings

EXAMPLE COMPETENCY AREAS:

- Financial services or asset-building with case management expertise
- Analytical, time management, and organizational skills and the capacity to integrate diverse objectives with a high level of attention to detail
- Problem-solving skills and a growth mindset
- Listening, communication, and facilitation skills
- Bilingual/multilingual preferred
- Commitment to social, racial, and economic justice
- Understanding of and ability to articulate the role equity, inclusion and diversity play in SparkPoint's work
- Lived experience or familiarity with the barriers faced by individuals and families who are struggling with employment, housing, food access, educational attainment, mental health, and financial wellness
- Ability to maintain confidentiality of sensitive information
- Proficiency in using a variety of computer software to track and monitor data, including but not limited to, Microsoft Office (Word, Excel, PowerPoint, Outlook) and case management software