Financial Navigator Job Description

The Financial Navigators Program aims to provide a rapid deployment of financial empowerment resources as part of Brownsville’s emergency response via a phone-based COVID Response program in partnership with cdcb. Navigators will remotely serve residents and help clients navigate critical financial issues and make referrals to other social services and necessary resources. Services to be provided to individual callers will include comprehensive and up-to-date Federal, State and County based government and nonprofit resources, safety net services and financial prioritization guidance.

Essential Duties and Responsibilities

• Participate in initial training of client management database (Compass) and available resources
• Conduct outbound calls to work directly with clients to assess their needs and select appropriate guidance
• Select appropriate next steps and referrals to resources identified within Compass
• Collect data using Compass
• Follow required protocol and program requirements
• Other duties as assigned

Qualifications

• Expertise in one of the following required: community organizing, customer support, social services, coaching/mentoring, teaching, or other related fields
• Knowledge of financial services is beneficial but not required

Essential Skills

• Excellent communication and interpersonal skills
• Strong attention to detail
• Self-motivated and adaptable
• Ability to use a client management database

Compensation

• This is a part-time position that will work 26-30 hours a week on a temporary one year assignment. The possibility of continued employment beyond this time frame will be based on demand and funding.

cdcob/COB IS AN EQUAL OPPORTUNITY EMPLOYER.
Interested candidates should email resume to: jnino@cdcb.org