

## Housing Advisor & Financial Coach I

**Summary:** The housing advisor/financial coach's responsibility is to provide participants with financial coaching and housing counseling to assist them to achieve financial security and build financial health and wealth. Specifically, they work with individuals and clients with one-to-one financial coaching to engage them in a process to reach their individual financial goals. In addition, financial coaches provide financial education workshops and file VITA federal income tax returns for residents throughout the Rio Grande Valley.

### Essential Duties and Responsibilities:

- Provide one-on-one coaching/counseling for participants of cdc's programs including homeownership, home preservation, CLC clients and general members of the community.
- Assist borrowers in default or at risk of foreclosure in preparing the information and documentation required by the servicer for evaluation of workout option in foreclosure prevention and creating an acceptable repayment plan.
- Conduct follow up communications with servicers and borrowers as needed to ensure receipt by servicer, address deficiencies in package, inquire about status of cases and escalate as needed.
- Assist clients in establishing a work plan to reach their financial goals.
- Assess each client's household financial profile and financial health in order to determine appropriate recommendations to improve credit, savings, and capacity to reach financial goals.
- Monitor participants progress toward financial goals and home purchase through follow up appointments.
- Document and maintain client files.
- Enter all case information into Outcome tracker to allow for accurate monitoring and reporting.
- Travel to meet with clients and provide necessary housing advising and financial coaching on-site.
- File basic federal income tax returns for VITA clients.
- Determine client eligibility for AFI Individual Account Matched Savings program.
- Edit, Iterate, and Refine online Financial Coaching Client Management tool.
- Develop and maintain relationships with community partners.
- Other duties as assigned.

**Qualifications:** High School Diploma or general education degree (GED) or higher; and related experience and/or training; or equivalent combination of education and experience. Completely fluent in Spanish.

**cdcb IS AN EQUAL OPPORTUNITY EMPLOYER**

Interested candidates should email resume to Kristine Saldaña at [ksaldana@cdcb.org](mailto:ksaldana@cdcb.org)