

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 provide one-to-one housing advising and 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 CDCB's programs including homeownership, home preservation, CLC clients and general members of the community.
- 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 participant's 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.
- 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.
- 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.

Supervisory Responsibilities: This position does not supervise others.

Qualifications: Completely fluent in Spanish.

Education/Experience

High School Diploma or general education degree (GED) or higher; and one to three months related experience and/or training; or equivalent combination of education and experience.

Language Ability

Ability to read and interpret documents such as rules, instructions and procedure manuals. Ability to write routine reports and correspondence.

How to Apply

Please provide a thoughtful cover letter that explains why you are both interested and qualified as well as your resume to:

- By email at: ksaldana@cdcb.org Subject: Housing Advisor & Financial Coach
- By Regular mail: Kristine Saldana. 901 E. Levee St. Brownsville, Texas 78520

cdcb is an Equal Opportunity Employer with a commitment to diversity. All individuals, regardless of personal characteristics, are encouraged to apply.

About cdcb

cdcb – come dream. come build. is a private, 501(c) (3) non-profit community housing development organization (CHDO). Founded in 1974, cdcb has been providing safe, sanitary affordable housing to the citizens of the lower Rio Grande Valley, Texas since 1974. cdcb is one of the largest non-profit producers of single-family housing for homeownership in the State of Texas. Our mission is to be a multifaceted affordable housing organization devoted to utilizing collaborative partnerships to create sustainable communities across the Rio Grande Valley through quality education, model financing, efficient home design, and superior construction