



# Job Description

<b>Department:</b>	Family Source Center (FSC)	<b>Location:</b>	Panorama City Area
<b>Job Title:</b>	Financial Coach	<b>Reports to:</b>	FSC Program Manager
<b>Exempt/Non-Exempt:</b>	Non-Exempt	<b>Revision Date:</b>	9/2025
<b>Position Type:</b>	Full-Time (40 hrs./week)	<b>JD Approved by:</b>	Lizz Diaz
<b>Pay Range</b>	\$22 - \$25	<b>Apply at:</b>	<a href="mailto:Carina.c@ecda.org">Carina.c@ecda.org</a>

## Job Description

### Position Summary

The FSC Financial Coach works closely with individuals and their families to improve their financial stability. In this role, the Financial Coach assesses clients' financial situations, provides personalized case management, and collaborates with clients and staff to develop practical financial plans, including budgeting, debt reduction, and savings strategies. The Financial Coach also leads workshops to improve financial literacy on topics such as banking, credit, budgeting, and debt, empowering clients to make informed financial decisions. Additionally, the Financial Coach is responsible for entering and managing client data and documentation within the FSC Program's electronic systems. The primary goal is to help individuals and families achieve greater economic self-sufficiency, with a focus on identifying their unique challenges and strengths to support goal-setting and long-term financial success. Other duties as assigned. ***This position requires daily in-person attendance as well as fieldwork.***

### Role and Responsibilities

- Conducts 1:1 financial assessments and creates personalized case management plans.
- Collaborates with clients to set clear, achievable financial goals.
- Provides guidance on budgeting, savings plans, debt reduction, and improving credit scores.
- Works with FSC staff to connect clients to food, social benefits, emergency funds, housing assistance, and tech support.
- Develops tailored plans addressing clients' needs in legal, housing, financial, employment, and mental health services.
- Connects clients to FSC services and community resources to improve income and academic achievement.
- Coordinates with Housing Stability Advisor to help families secure and maintain affordable housing.
- Participates in team meetings to discuss client progress and resolve challenges.
- Meets caseload productivity targets to fulfill program objectives.
- Engages in community outreach, including food and fund distributions.
- Cultivates relationships with internal and external partners for service delivery.
- Maintains regular contact with clients through appointments and phone calls.
- Collaborates with internal and external partners to support client needs.
- Attends staff meetings and participates in ongoing training.
- Leads or facilitates group meetings, consultations, and community events.
- Supports team with crisis intervention strategies when incidents arise with clients or families.
- Ensures accurate documentation, reports, and data entry in FSC systems.
- Meets agency and program deadlines consistently.
- Participates in team and community meetings as needed.
- Assists with special projects and tasks as required

### Qualifications and Education Requirements

- Bachelor's degree in finance, accounting or related field **or** be certified as a financial coach **or** a high school diploma with a minimum of four years demonstrated experience providing financial capability programs.
- Experience providing services to vulnerable populations preferred.
- Ability to work with people from diverse ethnic groups and various socioeconomic levels.
- Bilingual (English/Spanish) with excellent oral and written communication skills.
- Must have great organizational skills, be detail oriented and a self-starter with the ability to multitask.



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- The ideal candidate should be personable and have experience in the social services field with familiarity in the mental health field.
- Candidate needs to be motivated and able to communicate effectively, and efficiently, both verbally and in written format.
- Strong computer literacy including Microsoft Word, Excel, Access, Adobe PDF, Outlook, Google Drive, Internet, and other standard equipment.
- Must clear HIPAA certification, Department of Justice, and TB clearance.
- Must have a reliable vehicle/access to transportation, valid California driver's license, and be responsible for all liability on vehicle.
- Required to work "In-Person" and in dedicated or assigned site(s), and in the community on weekdays and some nights and weekends.
- Other duties as assigned.

## **Comment**

Candidates must be able to work effectively with their team and Manager, demonstrate adaptability, and can accomplish program goals and objectives. Candidates should demonstrate empathy, courtesy, interest, and a willingness to adhere to safety rules, as well as computer, email, Internet, and dress code policies. Must have valid California driver's license and use of personal vehicle that has liability car insurance. Candidates will receive their required BBS supervisory ratio for client services provided.

The benefits of joining the ECDA team include (If eligible: health insurance, vision, dental, long-term disability, AD&D, life insurance), vacation, sick leave, paid holidays, jury duty, bereavement, and 401K matching.

All employees must demonstrate an understanding, patient, and receptive attitude toward individuals of varied age groups, behaviors, and varied disabilities. Employees must have the ability to maintain composure under stressful conditions. Staff must be able and willing to work with clients who have special needs and/or aggressive behaviors (i.e., biting, kicking, hitting, emotional outburst, etc.). Staff must have behavior management strategies and techniques relating to clients experiencing behavioral difficulties, positive behavioral interventions and applied behavioral analysis.

El Centro de Amistad provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics. In addition to federal law requirements, El Centro de Amistad complies with applicable state and local laws governing nondiscrimination in employment at every company location. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.

## **Acknowledgment**

☐ By signing below, I acknowledge that I have read and understand the position description for this position, including the working conditions listed below. I feel I am qualified to perform the position duties as described, including the physical and mental requirements as outlined.

☐ By signing below, I feel I am qualified to perform the position duties as described with the following reasonable accommodations:

Employee Name:		Date:	
Employee Signature:			

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Physical Demands:			
	FREQUENTLY	OCCASIONALLY	SELDOM
Sitting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lifting 50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Carrying	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Squatting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pushing/Pulling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Seeing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fine Finger Movement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Environmental Demands:	
Outside:	Ability to spend 20% of work time outside
Inside:	Ability to spend 80% of work time indoors
Noise:	Ability to withstand moderate to high noise levels, including voice levels 90% of time
Heat:	NA
Cold:	NA
Electric Equipment:	Ability to operate office equipment, computer, copier, and cellphones
Work with Others:	100% of time spent working and interacting with team and other departments
Reading	Ability to read at a college level
Writing	Ability to write at a college level

**Disclaimer:** The above statements are intended to describe the general nature and level of work being performed by staff members assigned to this job. It is not designed to be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of the staff member assigned to this job.

**To apply or any questions, please email Carina Campos at [carina.c@ecda.org](mailto:carina.c@ecda.org).**