



Financial & Housing Counselor position open

Who is OnTrack WNC Financial Education & Counseling?

OnTrack WNC helps people achieve their money and housing goals so they can live out their values. We've been around for over 40 years and are committed to innovation. Our values include a supportive working environment, ongoing quality improvement, respect for our clients' wisdom, and meaningful diversity. We have a staff of 15.

What is the position?

We're seeking a fulltime Financial/Housing Counselor. You'll work with other counselors and educators to present information and options to people working towards various financial goals including: improving credit, handling debt, building savings, buying a house, and avoiding foreclosure. You will be trained on all aspects of the job but must have the aptitude to learn both the technical aspects of the job (e.g., foreclosure prevention, documentation) as well as the ability to communicate clearly and compassionately. Attention to detail and an organized work style are also a must. More specifics are in the job description below.

We are seeking a candidate who can help OnTrack WNC competently serve marginalized and/or minority populations including low-income residents, African Americans, Spanish speakers, and Slavic language speakers.

Why work at OnTrack WNC?

You will learn a lot and grow professionally while working with people who care about their jobs and do them well. You will earn between \$30,890 and \$33,010 plus medical/life/disability insurance (at three months) and 401(k) retirement (after one year). Your base salary will increase \$1000 within the first year upon passing certification exams.

Job Description

The Financial/Housing Counselor must have the ability and desire to relate to a wide demographic of clients, ascertain their particular needs and challenges, and adapt interactions to effectively help the clients move towards greater financial wellbeing.

The Counselor is responsible for providing one-on-one counseling sessions consistent with the organization's mission. The Counselor ensures service quality by *listening to clients*, adhering to agency policies and procedures, managing data collection and reporting, and fostering continuous improvement. Though functioning in sessions autonomously, the Counselor is also part of a team and is responsible for collaborating to continually develop our programs and to support peers.

To fulfill these roles, the Counselor must have good interpersonal skills; be an effective problem-solver; and, once fully trained, possess a working knowledge of finances, credit, and housing. Counselors must dress and act professionally while still making clients feel comfortable and must be organized and efficient in time/work management.

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Our non-profit mission is to help people achieve their money and housing goals through financial education, counseling, and support.

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Qualifications

- Four or more years of educational or professional experience including two years of related experience;
- Intermediate knowledge of Microsoft Word with ability to master these and other programs;
- Ability to work on projects independently in a detail-oriented, organized, and efficient manner while also working collaboratively in a team environment;
- Ability to relate to others, in behavior and dress, in a warm, caring, professional manner; and
- Ability to effectively problem-solve and convey suggestions in a constructive, nonjudgmental manner.

Job Duties

The Counselor performs the following duties on a regular basis:

- 1. Provides financial/housing counseling to OnTrack WNC clients:**
 - Conducts and average of 18-20 appointments per week, including at least one evening per week, one Saturday every other month, and other weekends and evenings infrequently, as needed; and
 - Conducts counseling for budgeting, credit building, debt, student loan, foreclosure prevention, homebuying, and other financial/housing counseling needs.
- 2. Manages client caseload, which includes:**
 - Develops strategies for addressing financial/housing issues based on the client's needs and capabilities;
 - Interacts with clients in a responsive, helpful, positive manner within scheduled appointments as well as in follow-up calls and emails; and
 - Ensures all documentation and data entry is completed in timely manner.
- 3. Participates as an active and engaged member of OnTrack WNC staff:**
 - Attends all program meetings, actively participates, provides thoughtful input, and makes informal presentations as assigned;
 - Participates in group and independent projects to do research, develop reference documents for use by the team, or otherwise improve services; and
 - Thinks broadly and creatively about how to enhance our services and possibly create revenue for the agency.
- 4. Takes ownership of work and communication:**
 - Strives for excellence;
 - Learns financial content, consistently incorporates new knowledge into service delivery, and uses support when needed;
 - Provides open, honest, and direct communication to supervisors and coworkers;
 - Provides timely and thoughtful responses to internal and external emails;
 - Takes full ownership of work and asks for help when needed; and
 - Maintains an organized work system to effectively manage job responsibilities.
- 5. Conducts other duties as assigned.**

Application Instructions

Cover Letter and Resume: Cover letter must accompany the resume. The first paragraph must include a bulleted listing of experience most relevant to the position.

Submission: Email cover letter and resume to Emily Matthews, Operations Associate, at emilym@ontrackwnc.org. **Subject line:** "Financial/Housing Counselor." No phone or drop-in inquiries please.

Applications will be accepted until Friday, May 19. Interviews will begin as qualified candidates are identified.