



## 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 17.

### What is the position?

Full-time (40 hours per week) Financial/Housing Counselor.

### As a Financial/Housing Counselor, what type of work will I be doing?

We are looking for someone who can help us continue to improve how we serve people of color, Spanish speakers, and low-income people. Specifically, we are seeking candidates with personal cultural experience within the African American and/or Latinx communities.

In private, confidential counseling appointments you will present information and options to people (clients) who are working towards various financial goals including: creating a budget, building credit, handling debt, buying a house, and avoiding foreclosure.

### Is there training?

Yes! You will be trained on all aspects of the job and need 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.

### 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 a starting salary of \$35,190 (unless there is considerable previous experience) plus healthcare (after three months) and retirement (after one year). Fluent Spanish speaking applicants are eligible for an additional \$3,500 in compensation.

### Job Description

The Counselor must have the ability and desire to relate to clients from a wide variety of backgrounds and life experiences, figure out their particular needs and challenges, and effectively help them 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 quality service 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 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 be able to offer suggestions/ideas in a constructive, nonjudgmental manner; be an effective problem-solver; be able to work on projects independently in a detail-oriented and efficient manner while also working collaboratively in a team environment; and (once fully trained) possess a working knowledge of finances, credit, and housing. Counselors must dress neatly and present in a warm, caring manner. Counselor 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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Revised: 9/27/2018

## Job Duties

The Counselor performs the following duties on a regular basis:

- 1. Provides financial/housing counseling to OnTrack WNC clients:**
  - Conducts counseling for budgeting, credit, debt, homebuying, student loans, foreclosure prevention, and other financial/housing counseling needs;
  - Develops strategies for addressing financial/housing issues based on the client's needs and capabilities; and
  - Schedules an average of 17-20 counseling appointments each week, including at least one evening per week, one Saturday every other month, and other weekends and evenings infrequently, as needed.
- 2. Manages client caseload, which includes:**
  - Interacts with clients in a responsive, helpful, positive manner within scheduled appointments as well as in follow-up calls and correspondence; and
  - Ensures all documentation and data entry is complete.
- 3. Participates as an active and engaged member of the staff:**
  - Attends all program and staff 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.
- 4. Takes ownership of work and communication:**
  - Strives for excellence;
  - Learns financial content and incorporates new knowledge into service delivery;
  - Provides open, honest, and direct communication to supervisors and coworkers;
  - Provides timely and thoughtful responses to 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.

Here's what we are looking for in your cover letter:

- List the experience you've had that is most relevant to this job. Help us make the connection between what you have done and what we're looking for.
- Tell us why you are interested in this job with OnTrack WNC.

Here's what we are looking for in your resume:

- Elements of previous work, school, or volunteer experience that will help you succeed in this job.

**Submission:** Email cover letter and resume in English to Emily Matthews at [emilym@ontrackwnc.org](mailto:emilym@ontrackwnc.org).

**Subject line:** "Financial/Housing Counselor – Your Last Name". No phone or drop-in inquiries please.

**Deadline:** Monday, April 22. Interviews will be scheduled as applications are received and until the position is filled.