



Exceeds Expectations, Inc.

**Position Title:** Financial Coach

**Employment/FLSA Classification:** Part-Time

**Work Schedule:** up to 25 hours a week

**Reports to:** Program and Community Relations Manager

**Location:** Office

**Pay Range:** \$18/hr

**Exceeds Expectations** is a 501(c)(3) organization with the vision to end generational poverty through financial literacy, personal/workforce development with one person, one family, and one community at a time. Our mission is to educate our community on financial literacy, inspiring them to invest in themselves, help them believe in opportunities, and achieve the impossible

### **Position Description**

We are looking for a **Financial Coach** to work directly with the KCMO community to offer financial literacy to further the mission and vision of Exceeds Expectations. The Financial Coach conducts individualized coaching sessions by assessing clients' financial health through one-on-one coaching and then develops a tailored set of recommendations to help clients improve their financial position and pursue their goals. The Financial Coach also facilitates and teaches financial literacy curriculum to individuals and groups ranging from adolescences to adults.

### **Responsibilities and Skills:**

- Works directly with clients to provide high-quality financial literacy coaching.
- Provides ongoing support and continue to actively engage clients to promote financial health and literacy.
- Documents services and gather session data for program reporting and evaluation.
- Delivers presentations/sessions on financial literacy, Exceeds Experiences services, and/or personal finance topics.
- Participates in regular team meetings.
- Research's financial products, consumer rights, and resources on an ongoing basis.
- Enhances and builds on curriculum.

### **Required Skills/Abilities**

- Experience in financial management, budgeting, financial literacy, coaching, and/or teaching.
- Excellent verbal and written communication skills and strong attention to detail
- Proficiency in Microsoft Office suite or related software.
- Strong ability to exercise knowledge-based professional judgement and discretion.
- Strong interpersonal skills and ability to work extremely well as part of a team.

### **Qualifications**

- Bachelor's degree preferred in finance, education, or related field
- At least two years of work experience in personal finance, financial services, money management education, consumer rights and/or social services