



## Financial Capability Coach

### Position Description

**Organization:** Westminster Economic Development Initiative, Inc.

**Position Title:** Financial Capability Coach

**Program Name:** Economic Development

**Supervisor:** Loan Operations Manager (LOM)

**Location:** Office at 436 Grant Street, Buffalo, NY

**Organization Mission:** WEDI's mission is to empower economically disadvantaged people in Buffalo, New York, with a primary focus on the West Side community.

**Organization Overview:** Since 2007, WEDI has served the City of Buffalo by tutoring children, building and rehabbing housing, and developing businesses through training, microlending, and a small business incubation. We primarily work with refugees, immigrants, and low-income individuals with programs and services tailored to these communities.

**Websites:** [www.wedibuffalo.org](http://www.wedibuffalo.org) / [www.westsidebazaar.com](http://www.westsidebazaar.com)

**Phone Number:** 716-393-4088

#### **Primary Purpose and Function:**

- Provide a broad range of financial literacy coaching and training to a minimum of 100 low-income participants to acquire the critical skills, knowledge and confidence to manage money wisely with the overall goal of reducing personal debt and/or building assets.

#### **Essential Functions and Responsibilities:**

- Coordinate and facilitate financial literacy education in one-on-one and group settings.
- Facilitate outreach of financial literacy services to communities served by WEDI.
- Provide credit and budgeting training to clients in one-on-one and group settings.
- Review, analyze, and translate/interpret credit reports for clients.
- Successfully refer clients to appropriate resources in the community to assist them in their needs.
- Maintain accurate logs and records of interactions and meetings with clients.
- Maintain up-to-date files and documents, which accurately reflect resources available in the community.
- Propose strategic adjustments to WEDI's financial literacy program to better meet the needs of the communities being served.

#### **Required Knowledge and Skills:**

- Strong understanding of credit, banking, lending, and financial management.
- Strong customer service tendencies, especially in cross-cultural contexts.
- Ability to manage, organize, and update relevant data using both cloud-based and software database applications.
- Superior communication and customer service skills and an ability to adapt to a wide variety of audiences, including clients, supervisor, direct report(s), peers, and external partners/vendors.
- Demonstrated self-starter who goes beyond job description to make sure goals are achieved.
- Very organized, detail-oriented and fast and comfortable with various computing programs, including strong Excel and database skills and knowledge of Google Suite.
- Demonstrated ability to meet deadlines with a high level of accuracy.
- Ability to thrive in an entrepreneurial, team-oriented, mission-driven environment
- Fluency in English language, both oral and written.

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#### **Preferred Knowledge and Skills:**

- Fluency in Spanish, Asian/African languages, and/or Arabic.
- Knowledgeable or ability to learn the neighborhoods and communities of Buffalo, NY, and immediate surrounding areas.
- Bachelors in Business, Economics, Finance, or a related field.

#### **Physical Demands:**

- Sitting in meetings for long periods of time, up to 2 hours at a time.
- Performing new client outreach by car, walking, or public transportation.
- Frequent alpha/numeric keyboarding.
- Frequent oral communication in person and over the phone.
- Ability to view a computer monitor for long periods of time.

#### **Organizational Policy/Procedure Compliance:**

- Follow all organizational policies and procedures and local, state, and federal laws.
- The organization does not tolerate sexually, violently, or other unlawfully discriminatory actions, gestures, harassment, or statements. Any of these behaviors are subject to personnel action up to and including immediate termination. Such actions must be reported to the supervisor immediately.
- Maintain confidentiality of organizational records and information at all times. Maintain a professional but friendly image.

#### **Interested Applicants:**

- If interested, please complete the EDC application here:  
<https://www.tscwny.org/Experience-Service/Economic-Development-Corps>.