United Way of Frederick County's

BUDGET COACHING

IN PARTNERSHIP WITH HOUSING FREDERICK

The free Budget Coach program is a 6-session financial wellness program, designed to help individuals create and follow a budget while developing a 3-5 year financial goal.

Volunteer today as a Budget Coach to help your ALICE neighbors become financially stable.

KEY RESPONSIBILITIES & DUTIES:

- Guide, teach, and compassionately support low-to-moderate income (ALICE) Budget Coach program clients, which may include UWFC savers as well as clients referred from a community partner, by providing one-on-one coaching.
- Assist in developing a plan to help UWFC savers accomplish specific financial goals related to their enrollment in either the Pathway to Transportation or Pathway to Homeownership program.
- Coordinate and manage reoccurring appointments for each client and continue to update and monitor progress throughout duration.
- Assist with recruiting more potential clients.
- Promote the Budget Coach program and be an ambassador for financial stability.
- Complete one-time mandatory budget coach orientation, and ongoing financial stability training at least twice/year. Training opportunities will be provided.
- Complete and submit one-on-one budget coach reporting as required (e.g. spreadsheet, Google form, narrative, etc.).

QUALIFICATION SKILLS

- Trust is a must! Respect and adhere to confidentiality with any given client.
- Strong interest in making a difference in the client's financial wellness and the community at large.
- Compassionate, empathetic, flexible to meet needs of diverse clients.
- Strong communication skills, interest in building relationships with first-time clients and seasoned savers.
- Supervision/Leadership/ Volunteer management or volunteer experience preferred.
- Ability to organize workload, work effectively and produce measurable results with minimal supervision.
- Understand financial literacy (knowledge of income and expenses, budgeting spreadsheets, asset building, working knowledge of credit scores and reports, etc.).
- Spanish-speaking/Bilingual a plus.

To learn more about becoming a Budget Coach, please email Mary Ellen Mitchell at programs@housingfrederick.org.



The Prosperity Center is a collective community partnership.
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