

The United Planning Organization (UPO) is the designated Community Action Agency for Washington, District of Columbia, and has served the residents of the District since 1962. Our **Vision** for the future is “UPO’s Washington: A city of thriving communities and self-sufficient residents;” our **Mission** is “Uniting People with Opportunities.”

The Community Reinvestment Division is seeking an energetic and experienced individual to join our dynamic team as a Financial Counselor/DISB Program. The ideal candidate must be a self-starter able to work in a fast paced, ever changing work environment, a team player and able to work independently with minimal supervision. This future employee will be expected to deliver a high level of customer support and service to both internal and external customers. The final candidate will need to have the right complement of skills, personality, and professionalism.

UPO is committed to attracting and retaining outstanding and diverse staff who will enhance our engagement and service in our communities.

All qualified applicants are encouraged to apply for this position or any other position currently advertised on our website. Please visit us at www.upo.org to view all of our vacancies and to learn more about our company and services.

POSITION:	Financial Counselor/DISB
OFFICE/DIVISION:	Community Reinvestment Division/DISB
BULLETIN No:	11102021
HOURLY RANGE:	\$20.5128 to \$23.0769 per hour (Commensurate with experience)
OPENING DATE:	10/29/2021
CLOSING DATE:	Open until filled
FIRST SOURCE:	N/A

MAJOR DUTIES:

Provide financial counseling services to targeted customers. Provide counseling to customers seeking financial, credit &/or banking assistance.

BRIEF DESCRIPTION:

Manage a caseload of at least 60 clients per year, meeting with each at least once monthly for at least one-half hour; Record, track, and retain records of counseling meetings and provide data as required. Complete requisite CFE and other trainings within 30 days of hire. Provide financial counseling services to clients including, but not limited to, developing financial health assessments and service plans, conducting regular follow up counseling sessions, and making referrals to wrap-around services to other UPO divisions or to community partners. Participate in Community of Learning Team meetings, offering insights for program improvements. Maintain professional standard of communication with colleagues, partners, and clients; and ensure work style contributes to team building and a professional environment where colleagues can work together productively. Provide other resources that will assist customer to sustain and maintain their financial needs. Coordinate with customers to prepare an individualized financial goal statement plan. Follow-up with the customers to keep them motivated on their financial goals and needs. Attend outside meetings with collaborating agencies.

Vacancy Announcement-10102021
Financial Counselor
Page Two

MINIMUM QUALIFICATIONS:

High school diploma or GED and 4 years of experience as a comprehensive financial counseling experience. Must obtain a comprehensive Financial Counselor certification within 6 months of hire. Excellent working knowledge of MS Office (Word, Excel, Outlook, and PowerPoint) and ability to use/learn electronic time-keeping program. Must be able to work sensitively and effectively with individuals of diverse educational, socio-economic and cultural backgrounds. Possess effective organizational and professional communication skills, both written and verbal.

DESIRED QUALIFICATIONS:

Associates degree and at least two years of work experience, with background in finance, financial education, counseling/coaching, or social service delivery. Particular expertise in one of the following areas: financial services, financial planning coaching/mentoring, teaching, or other related fields. Experience in performing light case management duties. Prior experience in a non-profit organization preferred. Bilingual/Spanish.

OTHER REQUIREMENTS:

In the event that an offer is extended, the candidate will be required to successfully complete a criminal background check and/or FBI fingerprinting, and pre-employment drug screening as applicable for the position.

This position IS covered under the collective bargaining agreement.

ALL VISITORS TO UPO FACILITIES

- **Must Wear a Mask While on UPO Premises;**
- **Must Practice Social Distancing; and,**
- **Will Be Subject to Temperature Scanning Upon Entering UPO Facilities.**

Submit your resume to
upojobs@upo.org