

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 Housing Counselor. 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.**

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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](http://www.upo.org) to view all of our vacancies and to learn more about our company and services.

<b>POSITION:</b>	<b>Financial Counselor</b>
<b>OFFICE/DIVISION:</b>	<b>Community Reinvestment Division</b>
<b>BULLETIN No:</b>	<b>1062022</b>
<b>HOURL RANGE:</b>	<b>\$21.5384 to \$23.0769 per hour (Commensurate with experience)</b>
<b>OPENING DATE:</b>	<b>June 27, 2022</b>
<b>CLOSING DATE:</b>	<b>Open until filled</b>
<b>FIRST SOURCE:</b>	<b>N/A</b>

**MAJOR DUTIES:**

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

**BRIEF DESCRIPTION:**

Market financial counseling services, recruit eligible customers, and manage financial counseling customers' caseload. Provide financial counseling services to customers including, but not limited to, developing financial health assessments and service plans; preparing individualized financial goal statement plans; conducting regular follow up counseling sessions; and making referrals to wrap-around services to other UPO divisions or other community partners. Record, track, and retain records of counseling sessions.

**MINIMUM QUALIFICATIONS:**

High school diploma or GED and 4 years of experience in finance, financial education, counseling/coaching, or social service delivery in credit and/or financial management. **Complete requisite CFE and other trainings within 30 days of hire.** Excellent working knowledge of MS Office (Word, Excel, Outlook, and PowerPoint) and

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ability to use/learn electronic time-keeping program. Must have effective organizational and professional communication skills, both written and verbal. Must be able to work sensitively and effectively with individuals of diverse educational, socio-economic, and cultural backgrounds

**DESIRED QUALIFICATIONS:**

Bachelor's degree in financial management, banking, accounting or other related field. CFE certified with at least four years of work experience, with background in finance, financial education, counseling/coaching, or social service delivery. Expertise in one of the following areas: financial services, financial planning mentoring, teaching, or other related fields. Possess highly effective organizational and professional communication skills, both written and verbal. Prior experience in a non-profit organization. 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.

**Special notice to all applicants:**

In accordance with the Mayor's Order (see reference below), every UPO employee, except for those with a medical or religious exemption, must be vaccinated by September 19, 2021. UPO abides by the requirements of all Mayor's Orders regarding COVID-19 Vaccinations; the Orders relate to the program under which you will work. **Mayor's Order 2021-099 - COVID-19 Vaccination Certification Requirement for District Government Employees, Contractors, Interns, and Grantees**

**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 cover letter and resume to the Career Center Online [Apply Here](#)**