



Financial Advisors to Expand City-Wide Team

Credit Where Credit Is Due (CWCID), engaged in a major 2011 expansion, seeks to add Financial Advisors to our corps of financial educators as we broaden our reach throughout New York City. CWCID is a 501(c)3 nonprofit which pursues a mission of financial empowerment via financial education and counseling programs. Our financial education programs serve 6,000 clients per year at over 50 sites city-wide, with significant projected growth over the next year as we move to new headquarters and scale our work. CWCID's programs are unique in that all financial education and counseling services are delivered in coordination with Neighborhood Trust Federal Credit Union, the community development credit union (CDCU) we sponsor, and with a network of other CDCUs in New York City.

Financial Advisors will be based in one of our citywide satellite hubs and will deliver our full package of financial empowerment services -- individualized financial counseling and our signature "Getting Ahead" financial education course (our signature financial education workshop series) -- and provide ongoing support to Program graduates to achieve financial health. Our services are offered days and evenings so Financial Advisors will have a schedule that includes up to two evening classes per week.

Responsibilities

- Provide financial counseling services via CWCID's individualized counseling model in a drop-in and appointment format.
- Deliver CWCID's "Getting Ahead" group program and provide support to graduates.
- Participate in cross-training and cross-referrals with host sites.
- Gather pre- and post-session data for program reporting and evaluation.
- Participate in program and curriculum development.
- Work as a team with credit union staff regarding the development of appropriate financial products and services for course participants.

Requirements

- Fluency in Spanish and English.
- Excellent teaching and facilitation skills.
- Business, finance, or financial education experience.
- Status as Certified Financial Planner or commitment to this or equivalent certification process (CWCID invests in this training and certification process for its entire team of Financial Advisors).
- Commitment to community economic development.

Salary: Commensurate with experience.

To apply: Please email cover letter and resume to Kathery Zapata at kzapata@cwcid.org.