



Job Posting Senior Financial Planner

Credit Where Credit Is Due (CWCID) is a 501(c)3 nonprofit which pursues a mission of financial empowerment via financial education and counseling programs, now located at 30 community-based organizations and schools throughout New York City. CWCID works in tandem with Neighborhood Trust Federal Credit Union under a shared CEO, enabling the delivery of financial products and services along with our education and advisory services. This comprehensive model ensures that working poor New Yorkers gain sophisticated and appropriate financial planning services and gain access to the tools to achieve long-term financial health via asset and credit development.

CWCID seeks a Senior Financial Planner to deliver individualized financial planning and our signature 10-hour “Getting Ahead” group program, including a commitment to work up to two evenings a week in the delivery of these services. The Senior Financial Planner will also be a member of the “Financial Planning to the Poor” Design Team tasked with adapting Certified Financial Planners standards for our program which specifically targets low-income individuals.

Responsibilities

- Provide financial advisory services to low-income individuals, including the delivery of individualized Financial Action Plans, within partnering organizations citywide.
- Deliver five-session “Getting Ahead” Program to participants via nonprofit partnerships citywide.
- Participate in program and development and creation of new industry standards.
- Assist in the development of appropriate financial products and services for low-income clients.

Trainer Requirements

- 2-3 years of experience as a Personal Financial Advisor or financial counselor, or a related role.
- Certified Financial Planner status required.
- Excellent teaching and facilitation skills.
- Fluency in Spanish and English.
- Commitment to community economic development.

Salary: Commensurate with experience.

Please email cover letter/resume to Laura Thorpe at lthorpe@cwcid.org.