



Volunteer Leadership Opportunity

CFP Senior Advisor / Potential Board Member

Overview

Credit Where Credit Is Due (CWCID) seeks a highly experienced and motivated CFP Senior Advisor / Potential Board Member to guide the development of our “Getting Ahead” Program providing financial education and financial services to New York’s underbanked community. The Advisor will assist in the design and launch of innovative financial products, as well as improved standards and protocols for providing effective financial planning services to our low-income clients.

CWCID is a 501(c)3 nonprofit that pursues a mission of financial empowerment via financial education and counseling programs now located within over thirty community-based organizations and schools throughout New York City. We serve Latino immigrants, welfare-to-work participants, domestic violence survivors, and ex-offenders to name a few of our partnership initiatives.

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 nonprofits and peer CDCUs in New York City. We provide financial education that is delivered in tandem with appropriate financial products and other support services so our program may serve as a real tool to achieving financial stability and long-term financial goals.

In 2007, CWCID approved a new strategic plan to transform our organization into a citywide vehicle for wealth creation among low-income New Yorkers. Our goal is to capitalize on the strength of the community development credit union model to extend our reach to some of our city's poorest communities, and create a sustainable model for providing savings, credit and wealth-building opportunities.

Responsibilities

- Advise on the development of appropriate and innovative financial products and services for low-income communities.
- Provide guidance on financial planning tools and procedures as CWCID continues to develop its financial education model and standards.

Skills and Qualifications

- Status as Certified Financial Planner (CFP)
- Able to contribute an average of 5-10 hours of assistance per month (remotely and/or in person)
- Experience in the field of financial planning. Product development experience a plus.
- Commitment to community economic development and community service.

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

For more information, visit www.cwcid.org.