

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

FINANCIAL ADVOCATE VOLUNTEER POSITION DESCRIPTION

Prepare + Prosper (P+P) strives to help customers boost their financial knowledge, confidence and habits. The Financial Advocate will work one-on-one with customers at Prepare + Prosper's tax clinics to discuss their individual financial goals to offer support and access to applicable financial products, services and referrals, with a specific focus on saving and direct deposit. 75% of P+P's customers report the intent to save a portion of their tax refund; the Financial Advocate's main focus is to help them take that action.

Role and responsibilities:

- Help participants gain clarity and develop action steps designed to achieve their financial goals
- Offer support, resources and encouragement to guide customers to their own answers
- Actively engage taxpayers to promote financial products and services
- Process U.S. savings bonds, prepaid debit cards, credit reports and financial counseling referrals
- Work cooperatively with P+P staff and other volunteers to provide high-quality service to customers

Skills required:

- An engaging personality and a willingness to approach taxpayers
- Ability to respect customers' financial decisions and actions with out judgement
- Passion and experience with personal finance topics including saving, spending, debt, and credit
- Empathetic and understanding of the financial challenges facing individuals with low- to moderate-income
- Enjoy working in a diverse ethnic and socio-economic environment

Commitment and timeline:

October - December, 2016

Attend one volunteer orientation

December 2016 - January 2017

Complete 10 hours of in-person training

January 21 - April 15, 2017

Volunteer one 4-hour shift per week

Locations

P+P operates 8 tax sites across the Twin Cities metro area, with locations in Minneapolis, St. Paul, Bloomington and Hopkins. Volunteers select a location that is convenient to work, home, or school. Our main office is in St. Paul near the intersection of University Avenue West & Highway 280.

