



WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

Position Opening: Financial Services Coordinator

Starting wage: \$15.00 - \$16.42 per hour

Title: Financial Services Coordinator

Supervised by: Tax + Financial Services Manager

Status: Full-time (40 hours per week), non-exempt, eligible for benefits

ABOUT PREPARE + PROSPER

Prepare + Prosper (P+P) is a leading organization in the Twin Cities area focused on free tax preparation and financial services. Based in St. Paul, Minnesota, we have a growing local and national presence in running and promoting programs that foster financial health for low- to moderate-income communities. Our team is expanding to reflect this growth. We are known for:

- serving 13,000+ taxpayers each year with high quality, free tax preparation and financial services and returning \$26 million annually in refunds,
- building organizational capacity through a high quality volunteer skills-based program with a corps of more than 550 volunteers,
- working with customers year-round in reaching their financial goals through a volunteer-based financial coaching program called Money Mentors,
- leveraging our on-the-ground expertise to facilitate policy change, and
- leading an emerging initiative called Financial Access in Reach (FAIR), which will bring to market and distribute financial products to help consumers transact, save, and build credit.

ABOUT THE FINANCIAL SERVICES COORDINATOR POSITION

The Financial Services Coordinator is a part of the Tax + Financial Services Department at P+P. P+P offers tax and financial services year-round at one site and seasonally at eight sites through the Volunteer Income Tax Assistance (VITA) program. The coordinator works closely with the Tax + Financial Services Manager and the Tax Services Coordinator to support the day-to-day operations of high quality financial services. The priorities of the Financial Services Coordinator are supporting customers on financial services issues, providing general education on financial products, and working with the department team to provide training and support for seasonal staff and volunteers.

HOW THE FINANCIAL SERVICES COORDINATOR POSITION BREAKS DOWN

Program support (approximately 45% of the position)

- Complete processing for financial services including submission of savings account applications, paper credit report applications, and SaveYourRefund promotional savings program entries
- Maintain close and positive working relationships with existing financial institution partners
- Build and maintain strong relationships with volunteers and seasonal staff
- Work with Financial Inclusion Manager to integrate FAIR financial product into financial service offerings
- Support tax clinic operations via GroupMe instant messenger app by answering procedural questions and questions related to financial products and services provided at P+P for site managers

- Prepare and maintain laptops and printers used for the tax and financial services by loading necessary software and providing basic troubleshooting
- Manage assembly of financial services supply boxes and distribution of equipment and supplies for 8 locations
- Act as a substitute site manager, providing direct supervision to volunteers and tax clinic management
- Complete basic tax preparation within the scope of the VITA program
- Provide ongoing information and ideas for program evaluation and improvement

Customer service (approximately 35% of the position)

- Provide customer service in-person, over the phone, and via email to answer follow-up questions on financial services and products, correct processing, and provide general financial product education
- Assist with general customer questions related to tax and financial services including making appointments
- Coordinate with Customer Service Manager and department team to follow-up and problem solve with customers regarding service at tax clinics

Training and knowledge development (approximately 10% of the position)

- Review volunteer training materials and forms for accuracy and clarity
- Assist with content creation for P+P financial services manual, promotional materials, and trainings in Articulate Storyline and PowerPoint
- Present in-person financial services and product trainings for volunteers and staff
- Assist Volunteer Resources Department with logistical support for volunteer training

Administration (approximately 5% of the position)

- Maintain inventory and orderly storage of equipment and supplies used for financial services
- Manage database and tracking of customers who participate in the P+P financial service program
- Pass annual VITA tax preparer certification tests

Other (approximately 5% of the position)

- Attend and actively participate in required educational programs and departmental and staff meetings
- Protect P+P's value by keeping information confidential
- Update knowledge by participating in educational opportunities; maintaining networks; participating in professional organizations
- Perform other duties as assigned by supervisor

WORK ENVIRONMENT

- This position operates primarily in an office environment that is accessible. Some work at off-site locations may be required and those may not necessarily be fully accessible.
- This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets, and fax machines.
- While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms.
- The employee must frequently lift and/or move objects up to 25 pounds and occasionally lift and/or move objects up to 40 pounds.
- Travel between the main office and remote Twin Cities locations is required January through April. Must possess a valid driver's license and an insured vehicle.

- Occasional night and weekend hours are required a few times a year and regularly during the tax season.
- Work place is a smoke- and drug-free environment.

HOW WILL YOU KNOW IF YOU ARE A GOOD FIT?

Overall, P+P seeks candidates who are smart thinkers, can be self-directed yet collaborative, and who operate outside of the box and care about making people’s lives better. The right candidate will have experience with:

- Financial products such as, savings accounts, Roth IRAs, and pre-paid debit cards
- Financial counseling, education, or services
- Articulate Storyline, Google Docs, and Microsoft Office (especially Microsoft Excel) and/or ability to quickly learn new software
- Public speaking as well as large and small group facilitation
- Providing direction and feedback to volunteers and/or desire to learn best practices in volunteer management
- Working effectively with people from diverse cultural and socio-economic backgrounds
- Communicating with people with limited English proficiency and/or ability to communicate in more than one language

WHAT MAKES PREPARE + PROSPER A GREAT PLACE TO WORK?

- We offer a compensation package that includes health, dental, and employer provided life insurance, short/long term disability insurance, retirement plan, flexible spending account, PTO, and paid holidays.
- We value inclusiveness, passion, compassion, excellence, innovation, and risk-taking in our work and our culture. We are an organization and team passionate about making positive impact on people’s lives. We provide flexibility in how employees carry out their work.
- Other opportunities: Prepare + Prosper values cross-team collaboration and in this spirit, offers and encourages employees participation opportunities in work groups outside their regular duties as interest and time allow. Employees also regularly participate in tax-time related activities such as volunteer happy hours, tax clinics, and training.
- Starting wage for this position is \$15.00 - \$16.42 per hour, depending on experience and qualifications.

HOW TO APPLY

- Please submit resume and cover letter and resume by July 17, 2017 to jobs@prepareandprosper.org with the subject line “Financial Services Coordinator”. Indicate in your email where you heard of the position opening.
- Position begins in early August.
- No phone calls please.

OUR COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY

Prepare + Prosper is an equal opportunity employer and seeks to employ qualified individuals based on individual merit. Prepare + Prosper does not discriminate against any individual with respect to the terms and conditions of employment based on that individual’s race, sex, age, religion, color, national origin, disability, genetic information, marital status, veteran status, sexual orientation, gender identity or expression, housing status, or any other non-merit factor protected under state, local or federal laws.

Equal Employment Opportunity applies to all personnel actions such as recruiting, hiring, compensation, benefits, promotions, training, transfer, termination, and opportunities for training. Prepare + Prosper is committed to a fair and equitable workplace where everyone is a respected and valued member of the team.