

# 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:

#### April - May, 2017

Attend one volunteer orientation

#### May 2017

Complete 10 hours of in-person training

#### June 6 - August 15, 2017

Volunteer one 4-hour shift per week

#### OR June - October, 2017

Volunteer two 4-hour shifts per month

### Locations

During the summer, P+P tax clinics operate only at our main office on University Avenue W & Highway 280.

2610 University Ave W.

St. Paul, MN 55114

