

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

Volunteer Financial Planner Volunteer Position Description

THE ROLE

During Prepare + Prosper's weekly tax clinics, on-site volunteers have conversations with customers about financial topics and make referrals to trusted partners. One of these referral options is a one-time consultation with a Certified Financial Planner™. Volunteer Financial Planners receive these referrals and schedule a one-on-one meeting to provide individualized financial guidance.

Volunteers will be trained on the economic challenges P+P populations face, in order to communicate with equity and respect. Volunteers will gain valuable experience working with diverse communities.

RESPONSIBILITIES + SKILLS

Responsibilities of the role

- Reach out to 2-3 participants per week during tax season to schedule a one-time one-on-one planning session (phone or virtual)
- Provide financial guidance based on customer objectives, including but not limited to: saving for retirement or education, life insurance, investing, retirement distribution options, cash flow management, and managing inherited assets.
- Respect financial decisions and goals, confidentiality, and privacy
- Engage in non-judgmental conversations with diverse populations
- Refrain from soliciting clients or selling products
- Log customer contacts and interactions

Skills Required

- Be a Certified Financial Planner™ professional in good standing with the Certified Financial Planner Board of Standards
- Ability to communicate with participants via phone and virtually
- Enjoy working with a racially and socio-economically diverse population
- Basic computer proficiency
- English proficiency required; additional language proficiency desired but not required

COMMITMENT + TIMELINE

Training commitment

- Virtual training session January 17, 2024 5:30pm-8:30pm
- Approx. 1 hour of self-paced virtual training in January 2024
- One 1-hour virtual follow-up session with P+P in March 2024 (date TBD)

Volunteer commitment (late January through May 31)

- Approx. 2 hours of volunteering per week
- Volunteers will be asked to provide feedback on an end of season survey
- Volunteers may have the option to extend through the end of August 2024

HOW TO APPLY

Complete this [application](#). After receiving your application, we will be in touch about next steps.

Questions? Email sara@prepareandprosper.org

Prepare + Prosper is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. We are committed to the principles of diversity, equity, and inclusion in our work. Learn more about P+P at prepareandprosper.org.