



## JOB DESCRIPTION

**Position Title:** Financial and Housing Counselor  
**Classification:** Salaried Position - Exempt  
**Reports to:** Assistant Project Manager for Housing Programs

### POSITION SUMMARY:

The Financial and Housing Counselor is responsible for providing one-on-one counseling sessions and workshops to clients consistent with the organization's vision and in compliance with regulatory/funding requirements. The Financial and Housing Counselor ensures the quality of counseling service by adhering to agency policies and departmental procedures, managing related data collection and reporting and fostering continuous improvement.

The Counselor reports to the Assistant Project Manager of Housing Programs. She/he serves as part of the Counseling Services Department, working collaboratively with staff members from other departments.

### SPECIFIC DUTIES AND RESPONSIBILITIES:

1. Provides financial and housing counseling to clients (number of sessions to be determined by the annual agency work plan). Work schedule will include some weekend and early evening hours.
2. Manages client caseload, which includes:
  - Developing ways clients can address their financial and homeownership objectives
  - Interacting with clients, in a professional, responsive, helpful and positive manner, within scheduled appointments as well as in follow-up calls, correspondence and contacts
  - Providing additional consultation/guidance on finance/housing issues
  - Advocating to creditors, attorneys, benefit providers and other resources on behalf of clients
  - Ensuring client files are complete, including appropriate information releases, file documentation, proper computer database entry into CounselorMax and responding to related correspondence
3. Manages monthly counseling schedule to ensure appointment availability.
4. Coordinate and conducts workshops for Financial and Credit Counseling, Budget Development, Debt Management Programs, Housing Counseling, Foreclosure Intervention, Pre-ownership Counseling, and Credit Report Reviews during evenings or weekends.

5. Provides information, advice and referral to consumers who call in with questions. Directs callers to make full counseling appointment when appropriate.
6. Collaborates and cooperates with various departments in responding to administrative duties in support of OLCDC's overall mission to serving the community.
7. Participates in staff and counselor meetings and trainings as scheduled.
8. Interacts with staff, board, clients and others in a professional, helpful and positive manner.
9. Conducts agency educational and community awareness programs and presentations as needed.
10. Represents agency at events, seminars, networking functions as needed.
11. Other duties assigned.

#### **QUALIFICATIONS:**

- Must have housing certification that is active and maintain.
- Strong interest and/or background in working in low-income, minority neighborhoods.
- Strong counseling skill sets and passion for this work
- Must be able to work independently and as part of a team.
- Flexibility and a "can-do" attitude are musts.
- Willingness to learn and take on new challenges.
- Minimum of one year, preferably three years' experience in one or more of the following sectors: housing, case management and/or social work.
- Knowledge of credit reporting, financial products, lending products and mortgages preferred.
- Basic proficiency with calculator, keyboard, Microsoft Word, Excel and Outlook.
- Experience with computer appointment systems, data entry and business writing.
- Ability to relate to others in a warm and non-judging manner (in person and over the telephone).
- Bi-lingual (Spanish language fluency desired).
- Strong and effective communicator.
- Minimum of an Associate degree, preferably a Bachelor's degree in a related field, or equivalent experience.
- This position is fulltime with required evening and weekend work.