



Human Resources
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Indian Preferences in Hiring shall apply to Swinomish Indian Tribal Community Job Opportunities.

JOB TITLE: Financial Coach

Scaled by:

DEPARTMENT: Education/ Workforce Development

POSITION SUMMARY:

Under the supervision of the Workforce Development Manager. The Financial Coach will provide financial business training and support to current and prospective Swinomish business owners. They would assist business owners in identifying and applying for startup loans, structuring business finances, and sustainable business practices. They would support Swinomish Community Members and internship programs by providing financial and homeownership training.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Provide financial business training and support for new or prospective business owners.
- Support new business owners in searching for start-up loans/ grants & walk them through the application
- Conduct client financial coaching through one-on-one, couple, or small-group sessions and understand personal financial information. Then, develop strategies and plans to help clients meet financial goals.
- Teach financial education materials to individuals and groups in alignment with financial coaching standards and financial plans for clients.
- Create training and curriculum on basic business finance and home ownership.
- Facilitate youth financial groups that develop positive financial habits and skills.

MINIMUM QUALIFICATIONS

Applicant will perform various administrative and clerical tasks, helping to support our office and ensure success.

Qualified applicants must have:

- Two years of experience providing financial coaching/mentorship services assisting with home ownership, startup/scale-up lending, construction loans, detached accessory dwelling unit loans, and debt remediation
- Certified Personal Financial Consultant program.
- Bachelor's degree or equivalent required; will consider a suitable combination of pertinent education, experience, and/or training.
- Excellent written and oral communication skills.
- Must have the necessary skill sets to empathize with clients about their financial situations while motivating and moving clients toward positive action.
- Must possess the content knowledge required to give clients high-quality and timely financial

education.

- Abilities to:
 - Be detail-oriented
 - Be highly organized
 - Work independently
 - Maintain strict confidentiality
 - Meet strict deadlines
 - Work in a cross-cultural setting
 - Efficiently and accurately type and enter data
 - Work within MS Office and Adobe Acrobat Professional, Canva
 - Act with integrity and professionalism at all times
- Familiarity with basic office procedures and organization.
- Strong working knowledge of office devices such as copiers, printers, scanners, etc.

WORK ENVIRONMENT AND TIME COMMITMENT

Work schedule is 40 hours per week. This is a full-time position. Tribal Administration Building with standard office furnishings and equipment. Work is generally sedentary but may require standing and walking for about 15% of the time. Noise level is usually moderate, lighting and temperature are adequate, and no hazardous or unpleasant conditions are caused by noise, dust, etc. Lifting and carrying up to 10 pounds is frequently required, with occasional lifting and/or carrying up to 25 pounds. Travel out of town and out of state, including overnight travel, is occasionally required.

EMPLOYMENT CONDITIONS

The Personnel Policies and Procedures of the Swinomish Indian Tribal Community apply to all employees. The position of Financial Coach is considered to be an exempt “standard hour” position. All offers of employment are contingent on the successful completion of a drug and alcohol screening. Suppose the work involves regular contact with or control over children or elders. In that case, a successful applicant must also meet minimum standards of character based on an extended criminal background check.

Employee: _____ Date: _____

Supervisor: _____ Date: _____