



RECRUITMENT NOTICE FOR FINANCIAL CAPABILITY COACH TRAINING

Are you passionate about financial literacy and helping others achieve financial stability? We are looking for dedicated individuals to join our **Financial Capability Coach Training Program!**

Purpose: These workshops aim to prepare individuals to become financial counselors for mortgage assistance programs, asset protection programs, loan programs, debt resolution, foreclosure prevention, and to help financially burdened individuals.

About the Program

- A comprehensive **12-week training** designed to equip you with the knowledge and skills to become a certified Financial Capability Coach.
- Learn key financial topics including **budgeting, credit management, debt reduction, and investment basics.**
- Training provided by industry experts with hands-on case studies and real-world applications.

Who We Are Looking For

- Bachelor's degree in Public Administration, Business Administration, Computer Information Systems, Economic & Finance, Accounting, or related field (preferred but not required).
- Experience in financial coaching, counseling, banking, or personal finance education is a plus.
- Individuals with a strong passion for financial education and community support.
- Strong communication and interpersonal skills.

What You Will Gain

- Certification as a **Financial Capability Coach** upon completion. (Trainees are required to earn a score of 80 percent or higher on the comprehensive financial capability exam after completing the assigned three courses)
- The opportunity to help individuals and communities achieve financial well-being.
- Become a financial literacy partner with the Dubois Bunche Center for Public Policy at Medgar Evers College.

How to Apply

Submit your training and partnership agreement with a **resume** to **latoya.benjamin57@mec.cuny.edu** by **Monday, March 24, 2025.**

Take the first step toward making a difference in financial literacy. Join our **Financial Capability Coach Training Program** today!

Training and Certification Overview

The Dubois Bunche Center for Public Policy at Medgar Evers College is seeking to train individuals to become dedicated and knowledgeable **DBC Financial Capability Coaches** to provide guidance and education to individuals seeking to improve their financial literacy and stability.

Purpose: These workshops aim to prepare individuals to become financial counselors for mortgage assistance programs, asset protection programs, loan programs, debt resolution, foreclosure prevention, and to help financially burdened individuals.

The ideal candidate will support the Dubois Bunche Center for Policy at Medgar Evers College clients in building financial skills, setting goals, and making informed financial decisions to enhance their overall financial well-being.

Key Responsibilities

- Provide 100 **one-on-one coaching hours and 12 group workshops** on financial literacy, including budgeting, savings, credit management, and debt reduction within 2 years.
- Assess clients' financial situations and develop personalized **financial action plans** to improve financial stability.
- Educate clients on **banking options, credit scores, loan management, and investment basics** to build financial confidence.
- Assist clients in creating **realistic financial goals and strategies** for achieving long-term financial success.
- Offer guidance on **navigating financial hardships**, including debt repayment, foreclosure prevention, and emergency financial planning.
- Stay updated on **financial policies, tools, and resources** to provide the most relevant and accurate financial guidance.
- Maintain detailed records of client progress and success stories, ensuring **confidentiality and compliance** with organizational policies.
- Collaborate with **community organizations, financial institutions, and support services** to provide clients with additional financial resources.

Benefits

Become a Certified Financial Capability Coach at the Dubois Bunche Center for Public Policy at Medgar Evers College and gain the expertise to guide others in:

- Mortgage assistance programs
- Debt resolution & foreclosure prevention
- Asset protection & loan programs
- Financial empowerment for struggling individuals

Training Overview

Module # 1- Building Skills for Financial Confidence

Trainees will learn how to facilitate engaging and candid conversations around using appropriate financial products and services, spending, saving, credit, protecting assets and maximizing income. This faculty-led course takes place over four weeks and includes up to a 90-minute weekly live web conference session, self-paced online assignments and the use of peer discussion forums. Participants should expect to spend approximately four hours per week on course related reading and assignments. The “Building Skills for Financial Confidence” course satisfies one of the three training requirements to obtain certification.

Wednesday, April 2	3pm to 4:30pm EST	live web conference session
Wednesday, April 9	3pm to 4:30pm EST	live web conference session
Wednesday, April 16	3pm to 4:30pm EST	live web conference session
Wednesday, April 23	3pm to 4:30pm EST	live web conference session

Module #2- Delivering Effective Financial Education Programs

In this course trainees will focus on how to deliver programs and services that work. It includes current practices and tools to support customers’ journeys in the program from pre- to post-service delivery. Learners will know how to better understand their customers. In turn, learners will increase their abilities to engage customers in the program, deliver tailored services that meet customers’ needs, and keep customers motivated to change behaviors and reach goals over the course of the program. This faculty-led course takes place over four weeks and includes up to a 90-minute weekly live web conference session, self-paced online assignments and the use of peer discussion forums. Learners should expect to spend approximately four hours per week on course related reading and assignments. The “Delivering Effective Financial Education Programs” course satisfies one of the three training requirements to obtain certification.

Wednesday, May 7	3pm to 4:30pm EST	live web conference session
Wednesday, May 14	3pm to 4:30pm EST	live web conference session
Wednesday, May 21	3pm to 4:30pm EST	live web conference session
Wednesday, May 28	3pm to 4:30pm EST	live web conference session

Module #3- Financial Coaching: Helping Clients Reach Their Goals

In this faculty-led online course, participants will gain an understanding of how to effectively incorporate coaching techniques into their financial capability programs. By using practical experience and demonstration activities, you’ll learn coaching essentials, including facilitation and listening skills as well as goal-setting and accountability methods. Participants will learn how coaching differs from and complements counseling, financial education and other services aimed at building consumers’ financial security. You’ll return to work ready to amplify your impact! This faculty-led online course includes self-paced online assignments and the use of peer discussion forums. The course is presented in four weekly lessons. A live online session is held weekly with the faculty and participants. Participants should expect to spend approximately four

hours per week on course related reading and assignments. The “Financial Coaching: Helping Clients Reach Their Goals” course satisfies one of the three training requirements to obtain certification.

Wednesday, June 4	3pm to 4:30pm EST	live web conference session
Wednesday, June 11	3pm to 4:30pm EST	live web conference session
Wednesday, June 18	3pm to 4:30pm EST	live web conference session
Wednesday, June 25	3pm to 4:30pm EST	live web conference session

**Must earn a score of 80 percent or higher on the comprehensive financial capability exam after completing these three courses for full certification.*



TRAINING AND PARTERSHIP AGREEMENT

PURPOSE OF AGREEMENT

The purpose of this agreement is to establish the terms of the partnership between the parties for the provision of financial coaching services. The parties agree to collaborate in delivering financial coaching to clients in accordance with the agreed terms.

This Training and Partnership Agreement ("Agreement") is made and entered into as of the date of signing by and between:

1. **Dubois Bunche Center for Public Policy, Medgar Evers College**, with its principal place of business at [1650 Bedford Ave, Brooklyn N.Y. 11225] ("Provider"), and
2. **[Participant Name]** _____, residing at
[Address] _____ ("Participant").

1. PROGRAM DETAILS

1.1 The Provider agrees to deliver a **12-week financial training program** ("Program") to the Participant _____

1.2 The Program will cover topics including but not limited to [Building Skills for Financial Confidence, Delivering Effective Financial Education Programs & Financial Coaching: Helping Clients Reach Their Goals].

1.3 The Program will be conducted through online sessions at scheduled times.

1.4 The start date of the Program shall be **Wednesday, April 2, 2025** and the end date shall be **Wednesday, June 25, 2025**.

2. PAYMENT TERMS

2.1 The total **\$1,080** fee for the program is waved as per the agreed participation obligations.

2.2 Failure to fulfill participation obligations may result in termination of the participant’s enrollment and a full refund of **\$1,080** payable to Medgar Evers College.

3. PARTICIPANT OBLIGATIONS

3.1 The Participant agrees to:

- Attend all scheduled training sessions unless prior notice is given.
- Complete all assignments and assessments as required.
- Maintain professional conduct during the program.
- Not share proprietary materials with unauthorized persons.
- Conduct 12 workshops and 100 hours of financial coaching in partnership with DBC within 2 years of certification.

4. PROVIDER OBLIGATIONS

4.1 The Provider agrees to:

- Deliver the program as outlined in this agreement.
- Provide necessary training materials.
- Offer reasonable support and guidance to the participant throughout the program.
- Cover the financial cost of training and certification.

5. CONFIDENTIALITY

5.1 Both parties agree to maintain the confidentiality of proprietary and sensitive information disclosed during the Program.

6. TERMINATION

6.1 The Provider reserves the right to terminate this Agreement if the Participant:

- Engages in misconduct or violates program policies.
- Fails to maintain participant obligations.

7. LIABILITY & DISCLAIMERS

7.1 The Provider shall not be liable for any direct or indirect damages arising from the participant's use of the training materials or knowledge gained from the program.

7.2 Completion of the program does not guarantee certification.

8. AGREEMENT ACCEPTANCE By signing below, both parties acknowledge and agree to the terms outlined in this Agreement.

Dubois Bunche Center for Public Policy, Medgar Evers College

Signature: _____

Date: _____

Participant Name

Signature: _____, Email _____

Date: _____

How to Apply

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