



Compass Center for Women and Families

Individual Financial Counseling

Volunteer

**** Position Description ****

The volunteer **Financial Counselor** provides individual counseling sessions on budgeting, credit, financial goal setting and related issues as requested by clients. Position reports directly to the Director of Financial Education.

Primary Duties

- ❑ Counselors are expected to help clients assess their income and expenses, and develop an action plan that is appropriate to each client's needs.
- ❑ Assist in the development of detailed budget that assists the client in reaching his/her financial goals.
- ❑ Advise and teach clients about the various "expenses" of utilizing credit to ensure their full comprehension of all charges and terms.
- ❑ Act in a compassionate and professional manner in dealing with all clients and circumstances.
- ❑ Evaluate the appropriateness of the Debt Management Plan (DMP) for clients and help them decide if it will meet their needs and goals. Compass Center does not offer DMPs but can refer clients to other agencies that do provide this service.

Qualifications

- ❑ 2-3 years of experience in a client-centered environment with demonstrated ability to support and assist others to meet their needs.
- ❑ Minimum 2-hour weekly commitment for at least 6 months.