



GREATER SOUTHWEST
DEVELOPMENT CORPORATION

Title: Senior Housing Counselor – Financial Coach

Reports to: Director of Residential – Financial Services

Location: Southwest REACH Center, 6155 South Pulaski Road, 2nd floor, Chicago, IL 60629

Senior Housing Counselor – Financial Coach

Position Purpose: Greater Southwest Development Corporation seeks the ideal team leader that will combine energy, leadership and innovation to the Housing Counseling Division. The Senior Housing – Financial Coach will assist with duties required by the department, including facilitating seminars, one-on-one sessions and trainings within all areas of the department, preparing mortgage-ready files, serving clients with our financial literacy services, foreclosure prevention programs, and managing data in client software systems. The Senior Housing – Financial Coach will have a deep commitment and passion for working with low- income, working class, and experience with Spanish speaking residents and communities.

Role and Responsibilities

- **Pre-purchase Counseling:** Create budget, conduct credit analysis and affordability assessment for potential home purchase. Implement work plan developed to satisfy client objectives and education requirements. Facilitate educational workshops on a monthly basis in English and Spanish. Conduct one on one counseling sessions- evaluate mortgage readiness, determine eligibility for various programs available to first time home buyers, create action plans, provide assistance during the home buying process, provide credit counseling. Enter all client data into the Housing Counselor Online (HCO) and/ or Counselor Max (CMAX) database. In efforts to maintain record and meet grant requests to funders and other stalk holders.
- **Post-purchase Counseling:** Follow up with homeowners regularly to assure sustainability and financial stability. Counsel participants on the responsibilities of owning a house. Collaborate with staff to facilitate educational workshops.
- **Foreclosure Intervention Counseling:** Help client with their delinquent mortgages loans, assist to negotiate retention options with various lenders. Manage pipeline in the Illinois Hardest Hit Program (Counselor Direct database). Senior Housing – Financial Coach will evaluate eligibility for the program and assist with the submittal of application to the State of Illinois. Collaborate with staff to facilitate foreclosure prevention workshops.
- **Financial Capability Counseling:** Counsel clients, providing debt management support; create emergency budget, credit analysis and financial assessment as necessary to assure client stay current in their financial obligations. Collaborate with staff to facilitate educational workshops.



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- **Clerical Support:** Maintain organized files and documents, schedule follow up client appointment (as needed), obtain additional documentation needed from clients, make reminder calls, make photocopies (as needed), substitute Intake Counselor during his/her lunch break, any other duties assigned by Director of Programs. Track each client’s progress and keep data updated and accurate. Create flyers and any other marketing material (as needed).

Knowledge

- **Department of Housing and Urban Development (HUD):** Knowledge of HUD programs, offices, resources, applications processes, and public and private partnerships.
- **Software systems:** Extensive knowledge of Microsoft Office Suite, HCO, HHF or other housing counseling reporting software. Previous experience required.
- **Customer and Client Service:** Knowledge of principles and processes for providing customer and client (internal) services; including client assessment, meeting quality of standards for services, and evaluation of client satisfaction. Previous experience required.
- **English Language:** Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar. Fluency and Previous experience required.
- **Spanish Language:** Knowledge of the structure and content of the Spanish language including the meaning and spelling of words, rules of composition, and grammar.

Skills / Abilities

- **Interpersonal:** Highly-developed interpersonal, oral and written communication skills; excellent presentation skills. Ability to communicate and actively listen at all levels with staff, Board of Directors and external relationships in a professional manner.
- **Complex Problem Solving:** Identifying complex financial issues and reviewing related information to develop and evaluate options and implement solutions.
- **Critical Thinking:** Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- **Time Management:** Managing one's own time and the time of others.
- **Writing:** Communicating effectively in writing as appropriate for the needs of the audience. Previous experience.



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- **Task Management:** Ability to prioritize multiple and varied tasks within broad guidelines.
- **Fluency of Ideas:** The ability to come up with a number of ideas about a topic, and the ability to inductively or deductively come about to solutions or resolutions. Previous experience.
- **Written Comprehension and Expression:** The ability to read and understand information and idea presented in writing; and the ability to communicate information and ideas in writing so that others understand. Previous experience.

Working Conditions

- Majority of work performed in a general office environment.
- Position requires availability for extended hours plus non-traditional hours to perform job duties.
- Also requires participation and attendance at conferences, meetings or organization-sponsored events and meetings across the city, region and country.

Physical Activity

- Nature of work requires an ability to operate standard business office equipment.
- Requires the ability to transport and carry up to 15 pounds of materials to satellite locations, though accommodations can be made to candidate that otherwise meets qualifications.
- Requires the ability to communicate and exchange information, collect, compile and prepare work document, set-up and maintain work files.
- Occasional local travel to GSDC main facility and satellite location may be required.
- Occasional day and overnight travel by air and/or automobile to conferences may be required.

Scope of Responsibility:

- Work with minimal direction.
- Meet all reporting deadlines.
- Significant impact on the programs and compliance functions.
- Regularly interacts with GSDC team, including and Development and Finance Departments.



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Qualifications and Education Requirements

- High School Diploma and or Bachelor Degree preferred
- Minimum of two years of housing counseling experience with HUD approved agency, required.
- Ability to become a HUD Certified counselor within 18 months of start date (REQUIRED).
- Ability to perform tasks concurrently with ease and professionalism.
- Conscientious and detail-oriented
- Knowledge of HCO, ECM, CMAX, HOPE Loan Portal or other housing counseling database is required.
- Ability to work effectively in team environment.
- Ability to represent GSDC in a positive and professional manner at all times.
- Must have weekend and flexible schedule for travel, trainings, meetings and seminars.

Benefits:

- Health and dental insurance and paid vacation and holidays.

How to apply:

Send Resume, Cover Letter and three references via email only, with the subject line “Senior Housing – Financial Counselor” to: Erica A. Zepeda, Director of Residential – Financial Services, at **e.zepeda@greatersouthwest.org**

Deadline for application:

- Until the position is filled.

Potential start date:

- July 1, 2018.

Required to be Bilingual:

English and Spanish

Job Category: Full Time - Exempt - Salary Range: \$35,000 – \$40,000 (depending on experience).

Greater Southwest Development Corporation (GSDC) is 501(c) nonprofit corporation and an equal opportunity employer. To learn more about GSDC, please visit www.greatersouthwest.org