

# WalCo Volunteer Financial Coach Position Description

General Description: Volunteer Financial Coaches agree to complete the Volunteer Financial Coach Training and provide one-on-one coaching for individuals/families that are seeking to accomplish financial goals.

Nature of Position: The volunteer receives 6 hours of training in the financial coach process, basic money management, strategies for dealing with financial problems, credit and debt management, savings, coaching and goal setting techniques and community resources. Some home study may be required. Following the training, each volunteer agrees to provide volunteer budget coaching with at least two individuals/families within one year of completion of training.

## Responsibilities:

- Assist individuals and families to analyze their financial situation and generate goals and action strategies to improve their financial situation.
- Practice effective communication and goal setting/coaching skills to interact with individuals and families in a respectful, nonjudgmental manner.
- Understand the uniqueness of an individual's attitudes, beliefs and values regarding money.
- Be familiar with a variety of financial education tools and community resources that may be useful to individuals and families.
- Complete volunteer activity reports and return them to the Walworth County UW-Extension Office.
- Promote the UW-Extension as an educational resource.

## Qualifications:

- Ability to work with individuals in a respectful and non-judgmental manner.
- Good communication and interpersonal skills.
- Sensitivity to and respect for individual differences.
- Ability to maintain participant confidentiality and trust.
- Able to volunteer to provide budget coaching for at least two individuals/families within one year of completion of training.
- Ability to attend all training sessions
- Access to a telephone and transportation
- Commitment to follow the coaching recommendations and avoid implying endorsement of any financial institution or product.
- Fill out the Walworth County Volunteer Application found at [http://www.co.walworth.wi.us/information\\_links/VolunteerResources.aspx](http://www.co.walworth.wi.us/information_links/VolunteerResources.aspx)

## Benefits:

- Receive up-to-date training and materials on financial management for personal use.
- Learn and build new skills.
- Become a member of a working team providing a valuable service to individuals and families in the community.
- Perform a valuable service to families in the community.



**Extension**

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WALWORTH COUNTY

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