

**Goodwill Central Coast**  
**Job Opening: Prosperity Planner Position**

**OVERVIEW:**

Do you want to join a dynamic team in helping change lives through the power of work? Goodwill has an exciting new initiative that demands a creative, intelligent worker who wants great things to happen for people. If you want to work for a growing company, with great benefits, that impacts your community-- this is it.

Goodwill Central Coast has created jobs and provided employment and training services on the Central Coast for more than 90 years to help people reach economic self-sufficiency. Goodwill is excited to expand upon our work and integrate a new model of service delivery - the Prosperity Platform. The Prosperity Platform will help people achieve their own goals and reach financial independence by helping individuals increase income, save, and build long-term assets.

We are seeking a Prosperity Planner who will work to expand families' vision of what is possible. Whether someone wants to go to school, own a house, get a job-or a better job — the Prosperity Planner will help navigate people to the resources it takes to increase earnings, reduce financial costs and generate new wealth for themselves and their families. The Prosperity Planner acts a coach, guide, navigator, and partner as people work towards defining their future and reaching success.

**DUTIES:**

- Provide one-on-one coaching and help participants make and achieve their own goals. Provide encouragement and support to help participants be resilient to set backs and be accountable to their goals.
- Assist participants develop a financial wellness plan that will help people budget, build credit, reduce debt, utilize financial products, and build assets.
- Develop career maps with participants to increase income and improve their position in the labor market. Connect and help participants complete education and training programs.
- Create and teach financial education workshops to help participants understand banking, budgeting, credit and other money management topics.
- Identify and develop active referral partnerships with community organizations that help participants achieve their financial and career goals. This includes developing relationships with financial institutions, education and training providers, basic need and income-support services, and housing organizations.
- Develop plans of action and provide tools, resources, and accountability to the participant to help them meet their goals.
- Create and disseminate evaluation instruments to determine impact of services and progress toward meeting personal goals.
- Maintain files and database for all participant activity.
- Collect, track, enter and report participant data for purpose of internal program monitoring on a weekly, monthly, and quarterly basis.

**QUALIFICATIONS:**

- Bachelor's degree (B.A.) in human services, finance, economics, education, social work, business, or related field.

- At least 2 years' experience in advising or coaching on financial or career matters; or equivalent combination of relevant education and experience.
- Background in financial coaching, banking, asset development and/or related economic development field preferred.
- Bilingual (Spanish and English) preferred.
- Ability to build long-term, trusting relationships with participants. Demonstrate compassion, non-judgment and understanding for the challenges that low-income adults face.
- Ability to foster, leverage and build community partnerships.
- Experience with self-sufficiency, vocational goals, financial planning or related counseling practices.
- Demonstrated knowledge of promoting economic mobility for low income adults.
- Ability to facilitate groups and teach classes of adult learners.
- Experience in or knowledge of best financial practices including money management, asset development, banking systems and income supports preferred.
- Understands and appreciates the culture and values of local residents, particularly of Latino residents. Is able to interact effectively with people of different cultures, helps to ensure the needs of all community members are addressed; and uses culture and context to support their work.

**HOW TO APPLY:**

Email copy of resume and cover letter to Anne Guthrie at [aguthrie@ccgoodwill.org](mailto:aguthrie@ccgoodwill.org)

Fill out a Goodwill application at [www.ccgoodwill.org](http://www.ccgoodwill.org)