



JOB DESCRIPTION

Job Title : HUD Certified Housing Counselor
Reports To : Program Manager - Financial Capabilities & Wealth Building
Classification : Full Time / Non-Exempt
Schedule : Monday through Friday (some evenings and Saturdays)
Date Revised : November 2019

Summary:

The HUD Certified Housing Counselor (HCHC) will work with the Financial Capabilities Service Team to provide education/training to families and/or individuals looking to purchase a home. The HUD Certified Housing Counselor's primary role will be to provide renters, potential homebuyers and homeowners with financial assessments, development of action plans to increase financial knowledge in order to help clients reach financial goals and put them on the path to homeownership and self-sufficiency

Duties and Responsibilities:

1. Assist with facilitating homebuyers education workshops, financial capability seminars, post-purchase and foreclosure classes, including room set up and distributing handouts
2. Provide one-on-one extensive financial coaching including sessions for action plans, budget development, debt management, review of credit report, emergency savings funds; that promote the client's best interest or choice in their effort towards home ownership
3. Monitor client caseload, which includes: developing strategies for addressing financial objectives
4. Conduct follow-ups via phone and/or email to determine whether or not the client is following their financial goal plan. The interaction with the client should always be in a professional, responsive, helpful and positive manner.
5. Record all communications, update log after each meeting or interaction with client or lender. Ensure that information is kept up to date and current at all times and enter customer data into CounselorMax tracking software.
6. Update Outlook calendar with appointments for clients to ensure that client's information is updated on a monthly basis. Manage monthly counseling schedule to ensure appointment availability
7. Ensure all client files are securely stored and complete with all required documents and forms including signed releases and any other documentation in compliance with current HUD regulations and the Housing National Standards
8. Follow and enforce the National Industry Standards for Homeownership Education and Counseling National Industry Code of Ethics and Conduct for Homeownership Professionals
9. Provide production reports to the Program Manager on a monthly basis or as needed
10. Collect HUD-1 closing statements, prequalification letters from clients and update various production reports
11. Participate in staff, counselor meetings and training as scheduled.
12. Represent agency at events and seminars networking functions as needed

13. Other duties as assigned by program management

Qualifications and Skills:

- Must hold a HUD Certified Housing Counselor certification
- Bachelor degree in the area of business, finance or related field with a minimum of three years of experience in housing counseling and/or financial coaching services
- Fluency in English and Spanish a must, Creole a plus
- Must have excellent verbal and written skills
- Attention to detail and excellent internal and external customer service skills
- Ability to work effectively with a team and balance multiple priorities
- Must maintain a professional appearance and relationship with clients and funders
- Ability to work with people of diverse backgrounds
- Ability to operate computer systems and software such as Microsoft Word, Excel, PowerPoint, Outlook and Internet

Additional Requirements:

1. Possession of or ability to obtain a valid Florida Driver's License is required
2. Independent travel is required
3. Available to work evenings, weekends and maintain a flexible work schedule
4. If selected, you will be required to pass a level 2 background check

Hispanic Unity of Florida is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and I understand my responsibilities.

Employee Signature _____

Date _____

Program Manager Signature _____

Date _____

Title _____

"This job description is not an employment agreement or contract. Management has the exclusive right to alter this job description at any time without notice".