Financial Coach

If you are a financial professional who loves helping people and has a knack for teaching and coaching, then becoming a financial coach at CLC could be a great fit. CLC is under contract with many of the nation’s top employers to provide telephonic financial coaching support to millions of households through their employee benefits program. Financial coaching is a salaried position – no prospecting is required. At CLC, we do not sell products, and there are no commissions. Your success is based upon your ability to engage our members and help them improve their financial health. Coaches guide and educate their clients as they address their financial challenges and accomplish their financial goals. Many customers find that they benefit from ongoing coaching support and meet regularly with their coach as they pursue their goals.

We provide coaching and education on the full-spectrum of personal financial issues. We are specifically interested in Certified Financial Planner™ Practitioners or similarly qualified individuals to educate in the areas of retirement or investments, CPA’s and Enrolled Agents to educate about tax, and individuals with expertise to educate in the areas of College Planning and Financial Aid.

Essential Functions

- Conduct telephonic financial coaching consultations that meet or exceed established company standards regarding customer satisfaction, accuracy, quality and timelines
- Receive and respond to customer inquiries via telephone or email
- Provide excellent customer service
- Provide accurate information to the customer in an understandable way
- Perform research when presented with complex questions
- Have the ability to multi-task while handling a high call volume – listen to the customer, document the conversation in our supporting applications, and speak to the customer
- Demonstrate excellent verbal and written communication skills
- Professional demeanor and appearance in face-to-face meetings with clients
- Flexibility in scheduling – must be able to work a schedule that can fall between 6:00 AM-8:00 PM

Experience and Capabilities

- Five or more years of experience in an area related to consumer finance, tax, college planning, or financial aid.
- Knowledge and comfort with a broad variety of financial issues
- Required to have a predisposition to assisting people in need, and a personality that lends itself to the habit of lifelong learning
- Good listening skills and ability to become a great coach who can motivate behavioral change in our customers’ personal financial habits
- Strong computer aptitude
- Demonstrates excellent verbal and written communication skills

Education Requirements

- Minimum 4-year degree from an accredited college or university or equivalent financial industry experience

- Enrolled Agent, CPA, Certified Financial Planner™ or comparable designation or experience preferred.

Resume: Please send your resume in the PDF format to

- human_resources@clchomeoffice.com