

## Head of Financial Methodology

At the heart of Clever Finance, you will find our Head of Financial Methodology. Our Head of Methodology is super close to the consumer, understands their needs at macro and micro levels and can take that understanding and inform our services. Clever helps consumers across a broad spectrum of needs, including: bankruptcy counseling, debt restructuring, savings, credit score coaching, cash flow management, retirement planning, financial planning and everything in between. We are a technology company that provides financial planning at scale. Our Head of Methodology owns our personal financial methodology and works with Engineering and Product to build scalable product experiences that customers love and that improves lives.

### What you will do

- Own the core financial planning methodology, beliefs and principles. Not only from a pure methodology perspective but also from a behavioral perspective.
- Work with Engineering and Product to develop software and engagement programs that engage and delight consumers
- Work with employer and partner stakeholders to explain and defend the methodology, principles and approach
- Manage the team of methodology professionals
- Have a loud voice in informing the consumer experience when engaging with live coaches
- Evangelize Clever in the media, press and general public
- Sit on the company leadership team, reporting into the CEO

### Who you are

- Empathetic to consumers across all levels of need
- CFP
- CFA (not required)
- Hands on experience performing financial planning across the spectrum of consumers (from those without resources, to the more affluent)
- Desire to build your personal brand (public speaking, book author, thought leadership)
- Entrepreneurial spirit and passion

Clever Finance is on a mission to help tens of millions of US workers improve their financial situation. We accomplish that through smart software, highly personal engagement and human coaches.

To apply, please provide a cover letter and resume. Please include a description of how you have served customers across the spectrum of needs. Send your application to [jobs@CleverFinance.io](mailto:jobs@CleverFinance.io)