Financial Coach

Are you interested in working at a stable and successful organization with a strong vision and core values? If you are a financial and sales professional who loves helping people and has a knack for teaching and coaching, then becoming a financial coach at CLC would 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. You will have pre-scheduled appointments – no prospecting is required.

Who We Are

CLC Incorporated (CLC) is a leading provider of financial programs, legal and identity theft for (EAP) Employee Assistance Program organizations, membership associations, insurance companies and national marketing entities throughout the United States and Canada. CLC provides services to over 28 million households and over 25,000 corporations. With our combined strength, and over 32 years of experience serving consumers, CLC is the leader in affordable identity theft, legal, and financial programs.

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, and **CPA's** and Enrolled Agents to educate about tax.

CLC's Impact

We receive consistent feedback on the impact our financial coaching program has had on our valued members.

CLC Member - *"My wife and I have a large amount of debt (student loans, personal loans, car loan and credit cards) in excess of $50K, and we used MSA services to help manage how to prioritize our debt, budget monthly, and reduce expenses. Chris was extremely helpful and provided invaluable tools for us to use, including providing us with financial wellness plans.*

Chris was fantastic! We met twice a month and would spend time reviewing expenses and tracking how we were spending compared to our plan. The tools he provided us (i.e. irregular expenses worksheet, expense tracking worksheet, etc.) have been very helpful in keeping us on track to meet our goals."

Your Role

- We are looking for a friendly, motivated, and inspiring financial professional to join our growing company.
- Have 30 minute telephone consultations with scheduled callers from across the U.S. that have questions or challenges with respect to their personal finances.
- Perform research when presented with complex questions
- Have the ability to multi-task while handling 10 to 14 consultations daily – listen to the customer, coach/educate on financial topic, document the conversation in our supporting applications, and schedule on-going consultations
- Demonstrate excellent verbal and written communication skills
- Professional demeanor and appearance over the phone or 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

Who You Are

- Required five or more years of experience in an area related to consumer finance or tax.
- 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

Your Education

- 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.