

VOLUNTEER FINANCIAL COACH

Objective: Financial Coaches provide personal, face-to-face budgeting assistance and support to new homebuyers in reaching their financial goals during the first year of home purchase. Through participation in this process, it is expected that homebuyers will:

- Identify realistic short-term, mid-term, and long-term goals
- Be able to easily distinguish between mandatory and discretionary household expenses
- Practice financial spending and goal achievement for at least 6 months before closing
- Regularly incorporate “emergency savings” in their budgets
- Be prepared to show their budgeting work to an Atlanta Habitat staff member before closing

Outline of Volunteer Responsibilities:

- Meet with assigned homebuyers one-on-one at the Atlanta Habitat office to assist them in developing financial goals, and creating a balanced budget
- Offer encouragement and suggestions for developing budgeting strategies
- Document coaching session, homebuyer goals, and action steps
- Provide accountability and schedule follow-up meetings.

Schedule and Time Commitment:

Face-to-face meetings are initially arranged by the Family Services Financial Education Coordinator, but subsequent meetings are scheduled by the Financial Coach and homebuyer. Meetings are typically scheduled for either one Tuesday evening or one Saturday morning each month for 6 months. The Tuesday meetings are from 6:00 pm – 8:00 pm and the Saturday meetings are from 10:30 am–12:30 pm. The average meeting lasts 1-2 hours. We ask all Financial Coaches to commit to an average of 1 meeting per month for at least 6 consecutive months.

Training and Support:

- At a minimum, volunteers attend the Budgeting Home Smart class and are encouraged to attend all financial Home Smart classes
- Volunteers meet with homebuyers on Atlanta Habitat for Humanity premises. Occasionally, coaching sessions may be held by telephone

Qualifications:

- Good working knowledge of budgeting and credit issues
- Excellent interpersonal skills and comfortable working closely with Atlanta Habitat’s homebuyers
- Must be 18 years of age
- All volunteers are screened using the sex offender registry and, if listed, will be disqualified from volunteering with Atlanta Habitat

To get started:

- 1) Attend Atlanta Habitat’s [Volunteer Orientation](#).
- 2) Attend a Financial Coach [Volunteer Training](#). After attending training, the Education Program Manager will contact you with an assignment, dates, and specific instructions.
- 3) Have Questions? Contact Jacolvy Garcia, at 404-223-5180 ext. 133 or jacolvy.garcia@atlantahabitat.org.