

Are you a qualified financial advisor or financial planner looking to give back to your community? **Volunteer as a Financial Coach today...**

Volunteer opportunity

Prosper Canada is seeking professional financial advisors and planners to volunteer as financial coaches. Volunteer coaches will work with people living on low-incomes in Toronto for a five-month period in 2015.

Under our new **MPower Money Coaching** pilot program, we are exploring whether appropriately trained and supported volunteers can support people living on low-incomes to set and achieve financial goals and build their financial capability.

The Volunteer Financial Coach position offers a unique opportunity for highly motivated financial professionals to give back to their community by providing guidance, support and ongoing encouragement to people with limited resources, who may be facing financial challenges and stresses they feel ill-equipped to manage.

Volunteer role

Financial Coaches will be trained and supported to work one-on-one with participants to engage them in a client-driven process to set financial goals and create an action plan, and then motivate them stay on track to achieve their goals.

Coaches will not be responsible for providing financial advice. Instead, they will help participants access the financial information they need to make informed choices, to access supports that are available to them (e.g. tax filing assistance), and to map out options they can choose from to build their financial stability.

Prosper Canada has partnered with Toronto Employment & Social Services (TESS) to deliver this pilot. Volunteers will serve as a Financial Coach to two highly motivated individuals selected from TESS' clientele. Participants may be on social assistance and/or receiving employment supports from a participating City of Toronto Employment Centre. Coaching sessions will be held at one of these centres:

- [Crossways Employment Centre](#) – 2340 Dundas St. West, 3rd floor, Suite 302, Toronto
- [Beaches Employment Centre](#) – 1631 Queen St. East, Toronto
- [Metro Hall Employment Centre](#) – 214 Wellington St. West, Toronto

Volunteers will provide participants with one-on-one financial coaching for 4-6 hours per month (including administration time) from June through October 2015. The coach will meet with each client once a month in person and offer additional support between visits by phone and/or text. Coaches will assist participants to:

- Set a financial goal(s)
- Develop a financial action plan
- Access help to file their taxes if needed
- Build a personal budget
- Increase savings
- Reduce debt and build credit
- Access appropriate banking products and services.

Financial Coaches will help keep track of participants' progress by entering information into a Client Management System at their first meeting, when they complete a financial health assessment, and as participants develop and implement their action plans.

All volunteers will be asked to comply with a Code of Conduct and guidelines related to confidentiality, regulatory compliance and quality management. Volunteers will not be permitted to promote or sell financial products or services to participants during the project or afterwards.

Volunteer training and support

Prosper Canada will provide all volunteers with the following training, tools and support:

- **Training** (4 hour session in mid-May) on foundational skills and tools for coaching clients with low incomes, including motivational interviewing and how to use evidence-based milestones and outcomes.
- **Webinar** (1.5 hours) on the use of the Client Management System (database).
- **Introduction to the City of Toronto Employment Centres** and related community resources.
- **Monthly teleconference** with Prosper Canada staff for program updates and troubleshooting.

Required skills and qualifications

- **Hold a professional designation/certification** (CFP, FPSC Level 1, CLU, and/or CHS)
- **Member in good standing of a relevant professional body** (Advocis, Independent Financial Brokers of Canada, and/or Financial Standards Planning Council)
- **Financial planning/advice experience** of at least 4 years
- **Interpersonal skills** – Empathetic and comfortable working with people from diverse cultural and socio-economic backgrounds
- **Prior volunteer experience** in a community setting (experience working directly with people living on low incomes a plus).

How to apply

Please submit your application by **April 24, 2015**. Click [here](#) to submit your application now.

Selected applicants will be contacted to schedule a telephone interview the week of April 27, 2015.

We thank all applicants for their interest, however, only those candidates selected for an interview will be contacted.

For more information please contact Ana Fremont, Program Officer at afremont@prospercanada.org or 416-665-2828 Ext. 237.

Prosper Canada

Founded in 1986, [Prosper Canada](http://www.prospercanada.org) is a national charity dedicated to expanding economic opportunity for Canadians living in poverty through program and policy innovation. As Canada's leading champion of financial empowerment, we work with government, business and community partners to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

City of Toronto Employment Centres

[Employment and Social Services](#) provides employment supports, financial benefits and social supports to people living in Toronto. The Employment Centres offer free resources and services to all Toronto residents, and the staff help low-income clients find a job or the training they need to find work, access financial benefits available through the Ontario Works program, and connect to health, housing, childcare and other social services available in the city.