



**CROATAN
INSTITUTE**

Bilingual Senior Associate – Financial Health Coach (Fluent in Spanish)

Location: Remote or Hybrid, North Carolina

Hours: 40 hours/week

Level: Mid-level

Compensation: \$79,597 – \$88,500

Description:

Croatan Institute is an independent, nonprofit research and action institute whose mission is to build social equity and ecological resilience by leveraging finance to create pathways to a just economy.

Our work at the nexus of finance, social equity and ecological resilience addresses the following cross-cutting themes:

Accountability

Business & Human Rights

Climate Solutions

Equity & Inclusion

Farming & Forestry

Food Systems

Frameworks & Data Analytics

Resilient Communities

Since the Institute's launch in 2014, we have rapidly established a reputation for rigorous, cutting-edge research and advocacy on a wide range of issues in sustainable finance and resilient economic development. The Institute's team includes a group of committed, interdisciplinary scholars, scientists, financial activists, advocates, and analysts who have developed a reputation for delivering rigorous research and actionable insight working on issues at the intersection of finance and social equity, and inclusion, climate change solutions, farming and forestry, food systems, institutional accountability, business and human rights, and resilient communities, as well as by developing useful frameworks and data analytics for sustainable and impact investing. Headquartered in the Research Triangle of North Carolina, Croatan Institute has a networked team based across the South, Mid-Atlantic, Northeast, Midwest, and in Geneva, Switzerland.

The candidate will be expected to be located in North Carolina. They could enjoy in-office hours at Croatan Institute's workspace located in Durham, NC, and some site-visit travel will be required across North Carolina.

The candidate will join the Institute's Racial Equity Economics Finance Sustainability (REEFS) program and report to the program's director. In addition to fulfilling the major responsibilities outlined below, the candidate will support the program's three pillars of work: (1) supporting frameworks to increase investments in diverse communities, (2) diversifying finance by creating a pathway for BIPOC and low-resourced students, and (3) achieving financial health among communities of color.

Details:

Croatan Institute seeks an Experienced Certified Financial Health Coach who will play a critical role in providing expert financial guidance to underserved communities. The primary objective will be to empower BIPOC and underserved farmers to make informed financial decisions, build wealth, and achieve financial stability, and promote the sustainability of their operations. It is anticipated the Finhealth coach will manage a growing portfolio of both English and Spanish-speaking clients beginning with 5 and growing to 60 clients over a three-year period. This role will play a vital role in providing expert financial guidance and education to individuals and businesses in the agriculture and food sector.

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Major responsibilities include:

- Provide one-on-one financial coaching sessions to clients from underserved communities, helping them set and achieve financial goals.
- Assess clients' financial situations, develop personalized financial plans, and monitor progress.
- Provide one-on-one financial coaching sessions to farm business owners and food enterprise operators, helping them set and achieve financial and business development goals.
- Assist farm businesses and food enterprises in conducting basic financial analysis, including creating business budgets, and profit and loss assessments.
- Support Financial coaching program and the development of the FARMWISE Resource Center.
- Design and deliver financial literacy workshops and training programs that address the unique needs and challenges of underserved populations.
- Collaborate with community partners to organize and facilitate group education sessions.
- Build strong relationships within Latinx and underserved farmers and food system workers to foster trust and promote financial health programs and resources.
- Advocate for financial inclusion and empower community members to access financial services.
- Collaborate with industry associations, agricultural extensions, and local organizations to organize group education sessions.
- Maintain accurate client records and financial progress reports.
- Assist in collecting data and outcomes to evaluate the effectiveness of financial coaching programs.

This role includes but is not limited to the listed responsibilities.

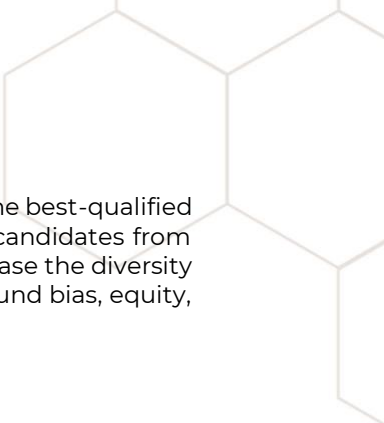
Qualifications and Expectations:

- Must be fluent in Spanish with cultural competency or lived experience.
- Certified Financial Health Coach with a recognized certification program (e.g., NACCC, AFCPE, CFEI, or equivalent).
- Three to five years of experience providing financial coaching and education as a professional or volunteer to Latinx and underserved communities.
- Willing to serve as lead relationship manager for strategic initiatives with capital and capacity-building allies in the NC ecosystem.
- Strong knowledge of personal finance topics, including budgeting, savings, debt management, and asset-building strategies.
- Experience writing business plans is desired, but not required.
- Empathy, cultural sensitivity, and the ability to establish trust with clients from diverse backgrounds.
- Excellent interpersonal and communication skills.
- Ability to work independently and as part of a team.
- Must be highly organized.
- Passion for promoting financial well-being and economic empowerment.

Compensation

Compensation will be commensurate with education and experience. To ensure pay equity, all salaries are set according to the expectations of the role and take into account geographic cost of living differences. Since the starting pay for this job is equal to others at the same level throughout the organization, we do not negotiate on salary. We have a transparent organizational culture when it comes to pay rates so that people do not have to negotiate since negotiation within work cultures has repeatedly been shown to disadvantage various kinds of people.

In addition to the salary, Croatan Institute offers a competitive benefits package, including opportunities to join our group medical, dental and vision insurance, paid time off (12 holidays and 15 personal days) for full-time-equivalent employees, employer contributions to either medical insurance or a health stipend, and a 3% employer contribution to a retirement plan, which is immediately vested.



Croatan Institute is committed to promoting diversity within its team while employing the best-qualified person for each job. We are an equal opportunity employer that strongly encourages candidates from diverse backgrounds to apply, and our team leverages its professional networks to increase the diversity of applicant pools. Our team also works internally to engage in frank conversations around bias, equity, and justice in order to support an inclusive workplace and culture.

How to apply:

Candidates should complete [this form](#) and upload a resume and list of three references. Applications will be reviewed on a rolling basis. We will start reviewing applications in mid-January, so we strongly encourage early applications. We will continue to accept applications until the position is filled. No calls or preliminary inquiries please.

For more information about Croatan Institute, please visit www.croataninstitute.org.