

## **Job Description**

**Position:** Small Business Development Center (SBDC) Financial Consultant

**Employment:** Contractor

**Classification:**

**Supervisor:** SBDC Director

### **Responsibilities of the Illinois Small Business Development Center (SBDC) Financial Consultant**

The position of Financial Consultant provides suggestions and solutions to customers according to their financial requirements. He/She will help clients to make smart financial decisions that can assist them in achieving their business goals. Will interview clients to assess their risk tolerance and financial goals. Will help to search and navigate the system to find loans or grants available to small businesses, and will aid clients in the process of applying for a loan including help completing an application.

### **SPECIFIC DUTIES**

- Talking to clients to determine their expenses, income, insurance coverage, financial objectives, tax status, risk tolerance, or other information needed to develop a financial plan.
- Answering client questions about financial plans and strategies and giving financial advice.
- Advising strategies for clients in insurance coverage, investment planning, cash management and other areas to help them reach financial objectives.
- Reviewing client accounts and plans on a regular basis to understand economic changes, situational concerns, or financial performance changes in their plan.
- Analyzing financial data received from clients to develop strategies for meeting clients' financial goals.
- Other duties as assigned

## **MINIMUM QUALIFICATIONS**

- B.B.A., B.A. or B.S. degree in business, management, economics, finance, accounting or equivalent field.
- Experience in financial advising
- Experience in banking
- At least 1 year of experience working with small businesses
- Excellent communications skills
- Ability to handle confidential information with discretion
- Demonstrated proactive approach to problem-solving with strong decision-making capability
- Ability to write, create reports and prepare PowerPoint presentations for Training Purposes (English and Spanish)
- Proficient with Google Apps including Gmail, Google Calendar, Drive and Docs.
- Intermediate level of proficiency with Word, Excel, PowerPoint and Adobe Acrobat.
- Ability to work with diverse communities including the LGBTQ population and demonstrate inclusion.
- Bilingual (Spanish/English)