**Lakota Funds**

Job Description

Asset Development Technical Assistance Specialist

Supervision: Reports directly to Executive Director

Job Summary: The Asset Development Technical Assistance (TA) Specialist will be responsible for the outreach and delivery of all asset development training and one-on-one coaching to inform and support individuals in understanding, establishing and attaining their asset development goals. Priority outreach to tenants and homeowners at Eagle Nest Housing, Lakota Funds clients, and LFCU members. Understanding of several websites and software and having the ability to adapt and utilize those programs efficiently.

Duties/Responsibilities:

Be knowledgeable of to promote, teach and refer clients to all of Lakota Funds products and services to promote financial education and asset building including:

* Financial literacy, Homebuyer Education courses and all BNII online courses
* Matched Savings Programs and Child Development Accounts/ Work closely with LFCU to ensure actively saving and continue to outreach to participants. Ensure they are sat up correctly and monitor monthly, along with monitoring CDA CDs/Savings.
* Volunteer Income Tax Assistance
* Credit Builder Loan
* Credit Coaching
* Business Loans
* Budget Coaching
* Organizational Reporting (Oweesta Quarterly (x2), HUD?, Salesforce (internal information), SDNHC monthly report, Neighbor Works America Quarterly, CDFI reports- as assigned by Executive Director.

Be knowledgeable of to promote and refer clients to Lakota Federal Credit Union products and services including:

* Savings and checking accounts
* Direct Deposit
* Debit card
* Online banking and Remote Capture Deposit
* Certificate of Deposit
* Consumer Loans
* Home improvement and home mortgage loans
* Vehicle Loan and Refinance
* Credit Cards
* Shared Secured Loan

Promote Youth Financial Literacy and CDA Program

* Assist CDA youth and families with:
  + Each youth has met required minimum deposits and is on track to qualify for full match
  + CDA youth and families have met training requirement
    - Training plan and schedule submitted annually to ensure CDA participants have reasonable and practical budget and savings goals.
    - Have written plan to confirm higher education and CDA cash out expenditure
  + CDA accounts are reconciled and confirmed accurate prior to withdrawals or match monthly.
  + CDA-CD rollover after 8 years of being in the program.
* Develop Youth and/or School Financial Literacy and Outreach Plan
  + Plan for outreach to schools
  + Plan for teachers, admin and staff outreach
  + Plan for other youth groups
  + Incorporate in budgeting and Car Buying 101
  + Plan for partner LFCU in Car Buying 101 and Mazaska and other partners in other Financial Literacy, Home Buyer Education and Post Purchase classes as needed.

Provide one-on-one technical assistance with clients to further asset development goals.

* Individualized plan for each with notes on each meeting
  + Track all time and details for each meeting either virtually or in their file. Have a work plan between the client and yourself that outlines next steps. Ensure they are actively participating and follow-up every two weeks to once a month.
* Track not only who TA was provided to, but what was covered and how much time was spent

Provide one-on-one technical assistance with ENH tenants to achieve homeownership goals.

* Individualized plan for each with notes on each meeting
* Track not only who TA was provided to, but what was covered and how much time was spent
* Formalize plan with partners Mazaska and LFCU to assist with and participate in TA
* Ability to utilize Annual Credit Report and other services to assist them with making their plan for homeownership.
* Understanding their income vs. debt situation and being able to make appropriate steps to correct any bad financial situation they might be in
* Debt-to-income ratio and other factors that are considered from the lenders point of view to ensure they are not denied a potential loan for homeownership.
* Understanding all options that are available to assist- match savings, HIP, knowing how to navigate internet and other software to fully assist them to the best of your ability.

Veterans Initiative

* Native American Veterans Homebuyer Education and Financial Literacy
* Work with SDNHOC and Mazaska to develop and implement Veteran HBE and FL
* Research and include other resources Native American Veterans have available to them
* Outreach and recruit for Lakota Funds Native American Veterans Homeownership Matched Savings Program

Internal and External Relations:

Participate in organizational, departmental, and outside training and education to increase and improve skills.

Nurtures and maintains positive relationships with partners to further Lakota Fund’s mission and purpose.

Additional job-related duties as assigned by the Executive Director.

Qualifications**:**

College degree in related area. Good writing and people skills. Self-motivated and able to work with little direct supervision. Ability to handle high volume of work and work closely with Lakota Funds lending team, LFCU staff and local and regional partners.

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Asset Development TA Specialist Date

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Tawney Brunsch Date