



**Title:** Bilingual Financial Empowerment Coordinator

**Reports to:** Portfolio Manager

**Classification:** Full time, exempt

**Schedule:** Monday through Friday, occasional evening/weekend event expected

**Location:** Downtown Tucson at 376 S Stone

**Background:** The Tucson IDA is dedicated to investing in the equitable, sustainable, and innovative future of Tucson. Our mission is to bridge access to capital for communities and projects that are otherwise underserved. Our projects include minority small business loans as well as Arizona's First Green Bank.

One of our signature programs in the AVANZA Empowerment Fund, a small business loan fund for underserved communities. This program leverages cutting edge innovative finance techniques and equity-informed practices to help business owners thrive. We are looking for a Bilingual Financial Empowerment Coordinator to evaluate loan applications and assist the Portfolio Manager on developing credit summaries for review by the Loan Committee. You will act as liaison between customers and our financial institution and you will help qualified applicants acquire loans in a timely manner.

We are willing to work to train you on the ins-and-outs of lending, but a good head for numbers, strong software/computer skills, and an exceptional attention to detail will be necessary to be successful in this position

The Financial Empowerment Coordinator must be oriented towards service and teaching. This role will require you to work closely with small business owners with various financial skills to help demystify business finances, and help them to feel empowered in growing their businesses. A working knowledge of the barriers that traditionally marginalized communities have faced when accessing capital, as well as strong cultural sensitivity are required to thrive in this role.

### **Responsibilities**

- Evaluate if applicants are a good candidate for lending by processing loan applications and documentation according to our Underwriting Policies and Procedures manual
- Interview applicants to determine financial eligibility and feasibility of granting loans, in both Spanish and English
- Determine all applicable ratios and metrics and set up debt payment plans
- Communicate with clients either to request or to provide information
- Justify decisions (approvals/rejections) and report on them
- Complete loan contracts and counsel clients on policies and restrictions
- Update job knowledge on types of loans and other financial services
- Maintain and update account records
- Assess customer needs, explore all options and introduce different types of loans



- Develop referral networks, suggest alternate channels and cross-sell products and services to accomplish quotas
- Go the “extra mile” to build trust relationships, customer loyalty and satisfaction throughout the underwriting process
- Operate in compliance with laws and regulations and adhere to lending compliance guidelines

### **Requirements and Skills**

- Exceptional written and verbal Spanish communication skills
- Experience building and reading financial documents such as Profit and Loss Statements, bank statements, and budgets
- Familiarity with computers and software programs
- Solid understanding of direct/indirect lending products and practices
- Strong interpersonal skills
- Customer satisfaction orientation and a passion for community service
- Ability to work in a goal oriented environment
- BS degree in finance, economics or a related field

### **Compensation & Benefits**

The Tucson IDA offers a competitive salary and benefits package including health, dental, vision, retirement, and other employee benefits.

### **To Apply**

Submit a cover letter and resume to [angelique@tucsonida.org](mailto:angelique@tucsonida.org).

*The Tucson IDA does not and shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations.*