

NOTICE OF VACANCY

Position Title: Financial Wellness Coach

SALARY: \$40,000 - \$46,000 annually

REPORTS TO: Executive Director of Financial Aid & Information Technology Services

BENEFITS: Institutional fringe package includes health, dental, & vision coverage, life insurance, FSA, and retirement plans; paid annual and sick leave.

POSITION DETAILS: Full-time; FLSA Exempt

HOURS: Monday-Friday; 8:00 AM to 5:00 PM; Flexibility outside of normal work hours may be required (if needed)

START DATE: May 1, 2026

SUPERVISORY DUTIES: None

POSITION SUMMARY: As part of Student Financial Services, the Financial Wellness Coach is a student-centered professional responsible for advancing student success, retention, and completion by delivering comprehensive financial wellness education, coaching, and outreach services. This position provides individualized financial coaching, develops and implements financial literacy programming, and collaborates with campus partners to reduce financial barriers impacting student persistence. This role integrates financial education, behavioral coaching, and resource navigation to support students in achieving financial stability during and after their college experience.

ESSENTIAL DUTIES & RESPONSIBILITIES:

- Provide one-on-one financial wellness coaching to students on topics including budgeting, saving, credit management, debt repayment, and financing education.
- Conduct holistic assessments of students' financial situations, including income, expenses, financial aid, and financial behaviors.
- Assist students in developing personalized financial action plans and setting short- and long-term financial goals.
- Support students in understanding financial aid processes, loan obligations, and repayment strategies.
- Provide proactive outreach and intervention for students experiencing financial hardship or at risk of attrition due to financial barriers.
- Maintain a working knowledge of Student Financial Services operations, including bursar functions such as student accounts, billing, and payment plan administration, in order to provide accurate guidance and support student financial success.
- Design, implement, and assess financial literacy programming, workshops, and classroom presentations.
- Deliver group workshops on financial topics such as budgeting, credit, student loans, and financial decision-making.

- Develop educational materials, digital content, and outreach campaigns promoting financial wellness.
- Collaborate with faculty and staff to integrate financial literacy into first-year experience and student success initiatives.
- Serve as a campus resource and subject matter expert on financial wellness.
- Partner with offices such as Financial Aid, Business Office, Student Life, Grants & Contracts, Student Success, and Career Services to provide coordinated student support.
- Connect students with internal and external resources, including emergency aid, scholarships, and community services.
- Participate in orientation, retention initiatives, and campus events to promote financial wellness services.
- Track student engagement, coaching outcomes, and program effectiveness.
- Maintain accurate case notes and documentation in compliance with institutional and FERPA guidelines.
- Utilize data to identify trends, inform interventions, and support institutional retention strategies.
- Prepare reports on program outcomes and student impact.
- Perform other related duties as assigned.

SKILLS & ABILITIES:

- Demonstrated knowledge of personal finance principles, including budgeting, credit management, debt repayment, student loans, and financial aid processes, with the ability to translate complex concepts into practical guidance.
- Ability to design, implement, and evaluate financial wellness programs, workshops, and outreach initiatives aligned with student success goals.
- Excellent oral and written communication skills
- Proficient with Microsoft Office Suite or related software; Technologically proficient
- Ability to apply coaching frameworks (e.g., motivational interviewing, goal-setting strategies) to support students in developing sustainable financial behaviors and achieving financial goals.
- Ability to engage diverse student populations with empathy, cultural competence, and a non-judgmental approach, fostering trust and rapport in one-on-one and group settings.
- Strong interpersonal and presentation skills, with the ability to effectively deliver workshops, facilitate discussions, and create clear, engaging educational materials.
- Skills in developing and presenting credible money management education to a diverse student audience, both in one-on-one sessions and group presentations.
- Excellent analytical and problem-solving skills
- Ability to collect, analyze, and interpret data related to student engagement and program outcomes; experience using data to inform decision-making and continuous improvement.
- Excellent organizational and time management skills
- Ability to proactively engage students through marketing, events, and targeted outreach strategies to increase participation in financial wellness services.
- Ability to handle sensitive and confidential financial and personal information with discretion and in compliance with FERPA and institutional policies.

- Ability to work with diverse academic, cultural and ethnic backgrounds of college students, faculty and staff.

REQUIRED QUALIFICATIONS, EDUCATION & EXPERIENCE:

- Bachelor's degree in Finance, Business, Financial Counseling, Social Sciences, or related field
- A minimum of Three (3) years of experience in Financial Aid, financial counseling, financial literacy, student services, or related field
- Demonstrated experience developing and implementing financial education and instruction for post-secondary students
- Knowledge of personal finance topics including budgeting, credit, and debt
- Demonstrated ability to work with diverse student populations in a higher education setting
- Strong interpersonal, coaching, and communication skills
- Ability to analyze financial information and guide individuals toward informed decisions
- Knowledge of financial literacy and financial counseling issues; and budgeting/debt reduction, problem-solving and intervention strategies

PREFERRED QUALIFICATIONS, EDUCATION & EXPERIENCE:

- Professional experience in a college or university setting
- Certification in financial counseling or coaching
- Experience developing and delivering educational programming
- Familiarity with student information systems and case management tools

PHYSICAL DEMANDS:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.
- Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is regularly required to talk and hear.
- Specific vision abilities required by this job include close vision.
- Prolonged periods of sitting at a desk and working on a computer.

WORK ENVIRONMENT:

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.
- Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.
- The noise level in the work environment is usually low to moderate.

TO APPLY:

Complete the USAO application at (<https://usao.edu/about/personnel.html>). When completing the USAO application, please attach a letter of interest, a detailed resume, three (3) professional/academic references, and any necessary transcripts.

ABOUT USAO: The University of Science and Arts of Oklahoma (USAO) is a public liberal arts college located in Chickasha, Oklahoma, about 40 minutes from Oklahoma City, and is a member of the

Council of Public Liberal Arts Colleges (COPLAC). It is charged by the Oklahoma State Regents for Higher Education to provide an outstanding general education program for the State of Oklahoma with strong offerings in the liberal arts and sciences. The experience will feature interdisciplinary team teaching and will extend throughout the undergraduate experience. To support this charge USAO is directed “to assemble a faculty whose interests, knowledge, and experiences transcend their specialized fields of graduate study and who are dedicated to liberal arts education.” For more information about USAO, see www.usao.edu.

AN AFFIRMATIVE ACTION/EQUAL OPPORTUNITY EMPLOYER

This institution, in compliance with Titles VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990, and other federal laws and regulations, does not discriminate on the basis of race, color, national origin, sex, age, religion, disability, or status as a veteran in any of its policies, practices, or procedures. This includes, but is not limited to, admissions, employment, financial aid, and educational services.

As required by the US Department of Education, employees are required to report violations under Title IX and, under the Jeanne Clery Disclosure of Campus Security Policy and Crime Statistics Act (Clery Act), select individuals are required to report crimes. If this position is identified as a Campus Security Authority (Clery Act), you will be notified, trained, and provided resources for reporting.