



Community Financial Advocate

Qualifications for employment with Watermark CDC include having made a life commitment to Jesus Christ, agreement in writing with the Beliefs and Governance statements of Watermark, and having a work history and a lifestyle that are consistent with biblical principles. Must be an existing member of Watermark Community Church or willing to become one.

JOB TITLE: Community Financial Advocate

FLSA STATUS: Exempt

ORGANIZATION: Watermark CDC

REPORTS TO: Executive Director

POSITION SUMMARY: Watermark CDC's vision is to "Transform the Economic Welfare of Our Community". Provide liaison expertise with assessing, meeting, and serving South Dallas neighbors' financial services needs through Watermark CDC and local bank partners.

SPIRITUAL GIFTS:

- Leadership
- Wisdom
- Service
- Discernment
- Hospitality

ESSENTIAL SKILLS & EXPERIENCE:

- Three to five years of financial services experience in personal & business banking, products, lending is preferred
- Excels in the ability to meet specific personal needs while communicating effectively with a variety of people from different backgrounds to understand their holistic and individual needs while empathizing with their concerns
- Previous experience in support of LMI – Low-to-Moderate Income – groups is preferred
- Strong project management skills and ability to oversee multiple priorities with a case management approach
- Active listening skills with the ability to provide superior personal customer service
- Comfortable and adaptable in an entrepreneurial work environment
- Strong verbal and written communication skills, especially in cross-cultural relationships
- Experience with Salesforce, Asana, and Microsoft Office preferred

POSITION RESPONSIBILITIES:

- Collaborating with Executive Director and Bank Leadership Committee to implement financial services strategy
- Serving as the liaison for Watermark CDC's financial services efforts through bank partners and financial products by building relationships with South Dallas neighbors and coordinating the various opportunities & services
- **1. Financial - Coordinate Financial Services – 60%**
 - Connecting participants of Watermark CDC initiatives, Watermark South Dallas church members, and neighbors to financial services & products provided by bank partners for financial empowerment
 - With 60% of the role focused on this responsibility, there are 3 main areas of focus (in this order):
 - Commercial – connecting business owners to bank partners for bankable and capital access
 - Consumer – collaborating with banks as they seek to host seminars in South Dallas
 - Mortgage – assessing the various efforts and developing key partners for effectiveness
 - Coordinating educational programs for community neighbors about relevant issues or topics such as personal banking, lending, and more to equip and empower our neighborhood
 - Recommending unique opportunities to the Bank Leadership Committee of products and services to offer
- **2. Community - Deepen Relationships – 20%**
 - Identifying neighbors who are not currently banked nor confident in banks to learn their needs and previous situations resulting in distrust, and then propose solutions based on their individual situation
 - Building relationships with key South Dallas leaders to increase trust; establish network of strong relationships with community-based businesses, non-profit organizations, church pastors, etc.
- **3. Advocate - Propel Watermark CDC Initiatives & Local Partners – 20%**
 - Referring neighbors /clients to participate in Watermark CDC and other local partner initiatives for additional products and services, as beneficial and helpful for everyone

- Partnering with Watermark CDC leaders to promote & modify initiatives to better meet community needs

MARKERS OF AN IDEAL CANDIDATE:

- Has a deep love for Jesus and the local church
- Passion for supporting Kingdom work through economic development in our city
- High capacity, gritty leader who is warm, hospitable, and joyful in demeanor
- Humble, courageous, and open to direct feedback
- Autonomous self-starter, yet also a team-player