Financial Planning Association, San Francisco Chapter
Job Posting

FIRM INFORMATION
DATE OF APPLICATION:6/10/20

Firm Name: Moneymap
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POSITION TITLE: Financial Planning role in Duke research project to scale financial coaching [remote]

Contract position, half-time to full-time

Position Description
We are looking for outstanding full or part-time financial planners interested in participating in cutting edge research conducted by Dan Ariely's Center for Advanced Hindsight at Duke University. The question that we're trying to answer through a randomized controlled trial is "How do we scale financial guidance using a high-touch, high-tech approach that helps people reduce their financial stress and achieve their financial goals?" If you're interested in getting paid to help us find out the answer, then read on…

We know applying for and taking on a new role at any company requires a leap of faith. We want you to feel comfortable and excited to apply to Moneymap. At Moneymap, we are a 100% remote company, focused around these core values that drive our company culture:

- **Being of Service:** We value the joy and professional satisfaction that comes from helping people tangibly improve their financial lives.

- **Default to Transparency:** When working in a remote team it's both tough and important to stay on the same page. That's why regularly sharing goals, challenges and successes together helps us better serve those who rely on us.

- **Stay flexible:** There are a lot of moving parts, so quickly adapting and thriving in a new environment is key.

We hope you'll take the leap of faith and apply. Moneymap is proud to be an equal opportunity workplace dedicated to pursuing and hiring a diverse workforce.

Even though the description of the role below may seem like we're looking for a specific person, the role inevitably gets tailored to the person who applies and joins. Regardless of how well you feel you fit our description, we encourage you to apply if:

You're motivated by helping people with their money issues, want the financial services industry to ethically help more low-to-moderate-income people, have a secret desire to better understand how large academic research projects are conducted, manage your time effectively and like interacting with lots of people.

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About You

- You are an active listener and you know how to ask the right questions to help understand a person's financial challenges, while helping to build their confidence.
- You quickly learn new systems and are comfortable with using technology to manage communications with the people you support.
- You are open to trying new approaches to help people take action on their financial issues.
- You work well on remote teams and are comfortable working independently.
- You have at least three years of experience interacting with people around their personal finances, and are ideally a CFP® Professional.
- You can relate to non-wealthy individuals and are comfortable supporting people on foundational financial goals such as saving for an emergency or paying off debt.

Things You'll Likely Do

Moneymap is a small, innovative and remote-first company, so you'll likely get broad experience on different projects across the organization. However, your main responsibility will be to support people on their financial goals. Here are some things you'll probably do:

- Call individuals, using the behavioral script developed by leading experts at Duke, and talk with them about their financial goals and collaboratively design an action plan of 3-4 key actions that they can take over the next month.
- Assess the data shared by individuals and select key actions for them to complete, without having a live meeting.
- Record 30-60 second video messages for the individuals that you're supporting.
- Collaborate with your dedicated assistant to decide which follow-up messages, from the individuals you've been matched with, you should answer and which ones you can delegate to your assistant.
- Report progress on goals (OKRs) to the greater Moneymap team.
- Collaborate with your fellow financial coaching team members to share best practices and develop new team protocols.
- Communicate challenges/blockers to the Product team, and provide feedback on new features.
- Help individuals using Moneymap have the best user experience possible.

About Moneymap

For the past four years, Moneymap has been helping people take action to achieve their financial goals. We do that by providing highly-qualified financial coaches and a research-backed program designed to bridge the gap between intention and action.

Moneymap, in partnership with Duke University, is embarking on an exciting funder-sponsored research project to assess the impact of technology-enabled financial coaching, through a randomized controlled trial. Research results are anticipated to be published in 2021.

We believe that by pairing individuals with a dedicated financial coach and co-designing a goals-based action plan, we can have a dramatically positive impact on the lives of the people we serve.

We believe that technology can help us scale our approach, through just-in-time message automation and artificial intelligence, built on a multi-channel communication platform.

We believe that financial experts are indispensable in helping people with their financial goals.

We believe in small teams. Small teams are fast and nimble. Small teams mean less bureaucracy, less management and can get more things done.

We believe in a safe, welcoming, and inclusive work environment.

Compensation:
This is a half to full-time contract-based role with competitive pay (we don't use remote as an excuse to pay less) for the duration of the research project. Based on performance, it could become a full-time hire position at Moneymap. The role will possibly taper with fewer hours from September-December of this year, however the initial half to full-time availability requirement may continue for many months.

How To Apply

We have a non-standard application process. To jump-start the process we ask a few questions we normally would ask at the start of an interview. This helps speed up the process and lets us get to know you a bit better right out of the gate.

After you apply, you are going to hear back from us, even if we don't seem like a good fit. In fact, throughout the process, we strive to make sure you never go more than seven days without hearing from us.

Optional: Share anonymously some demographic information about yourself to help us better track trends related to the backgrounds of candidates interested in working at Moneymap in order for us to build a team that represents the users at Moneymap and the broader world population.

Moneymap is an equal opportunity employer. We're excited to work with talented and empathetic people no matter their race, color, gender, sexual orientation, religion, national origin, physical or mental disability, or age. We celebrate our differences because those differences are what allow us to make a product that serves a diverse user base.

Apply Today

Apply by sending an email to hiring@financialwellness.us with answers to these questions:

- Why did you choose financial planning or financial guidance as a profession?
- What is exciting to you about this opportunity?
- How do you feel about providing coaching support to hundreds of people over a short period of time?
- What's the link to your LinkedIn profile?