



---

DbA: Utica Neighborhood Housing Service, Inc.

**JOB DESCRIPTION**  
**HOME ADVISOR**  
**Housing Counseling/Group Education**

## **MISSION**

The primary purpose of Utica Neighborhood Housing Service, Inc. is the revitalization and growth of neighborhoods.

## **SUMMARY**

The Home Advisor is responsible for providing group education and one-on-one sessions to agency customers consistent with the organization's vision and in compliance with regulatory/funding requirements. The Advisor ensures service quality by adhering to agency policies and departmental procedures, managing related data collection, and reporting, and fostering continuous improvement.

To fulfill these roles the candidate must have good interpersonal skills, be comfortable speaking in a group setting, be an effective problem solver, and be able to convey suggestions/ideas in a constructive, nonjudgmental manner. Candidate must be organized and efficient in time/work management.

## **DUTIES**

1. Provides financial/housing group education and individual counseling to HOC clients (number of sessions to be determined by the annual agency work plan).
2. Manages customer caseload, which includes:
  - Developing strategies for addressing financial objectives.
  - Interacting with customers, in a professional, responsive, helpful, and positive manner, within scheduled appointments as well as in follow-up calls and correspondence.
  - Providing additional consultation/guidance on finance/ housing issues.
  - Ensuring customer files are complete, including appropriate information releases, file documentation, proper computer database entry, and related correspondence.
3. Manages monthly counseling schedule to ensure appointment availability.
4. Conduct group Homebuyer Education Classes.
5. Individual customer appointments for Financial Coaching and Counseling, Budget Development, Debt Management, Credit Report Reviews, Pre-Homeownership Counseling, Housing Counseling and Foreclosure Prevention and Intervention.
6. Participates in staff, team meetings and training as scheduled.
7. Interacts with staff, board, customers, and others in a professional, helpful, and positive manner.
8. Conducts agency educational and community awareness programs and presentations as needed.
9. Represents agency at events, seminars, networking functions, as needed.
10. Other duties as assigned.

## **SKILLS**

1. Demonstrate excellent communication skills both verbal and written.
2. Ability to work with co-workers, customers and partners of diversified backgrounds with a positive, optimistic, solutions-oriented attitude.
3. Exhibits professional conduct, appearance and attitude.
4. Detail oriented, with the ability to manage multiple priorities.



5. Shows an ability to manage stress and maintain professional demeanor.
6. Demonstrates familiarity with the technology utilized by the company.

## **QUALIFICATIONS**

1. High School Diploma and equivalent combination of training and experience or Associates/Bachelor's degree in a related field.
2. Two or more years of experience in the financial or customer service industry.
3. Knowledge of credit reporting, financial products, lending products, and mortgages a plus.
4. Basic proficiency with office equipment: Microsoft Word, Excel, PowerPoint & Outlook.
5. Experience with computer appointment systems, data entry, and business writing: Experience with Salesforce preferred, but not required.
6. Ability to work on projects independently with strong personal organization.
7. Ability to relate to others in a warm and non-judging manner (in person and over the telephone).

## **Special Consideration for:**

- Bi-lingual
- Working knowledge of finances/credit
- Housing counseling certification and/or credit counseling certification
- Financial/housing; coaching/counseling experience

## **Training/Certification Expectations:**

- Obtain HUD Housing Counselor Certification within 6 months of hire.
- Obtain HUD Loss mitigation certification within 12 months of hire.

## **SCHEDULE**

This is a full-time position, 38 hours per week Monday through Thursday, however the candidate must be available to work flexible hours (occasional evening and Saturdays) to accommodate the needs of class & customers. The candidate will be required to travel nationally to attend paid trainings and obtain/maintain certifications

**Please submit your cover letter and resume via email to [DSmith@unhs.org](mailto:DSmith@unhs.org); or by mail to HomeOwnershipCenter, Attn: Danielle Smith, 1611 Genesee Street, Utica, NY 13501.**