NEXUS
FINANCIAL DISCIPLESHIP CENTER
— Connecting Principles to People —

RON BLUE INSTITUTE
INDIANA WESLEYAN UNIVERSITY

NEXUS Financial Coach Application

The NEXUS Financial Discipleship Center is accepting applications from students to fill Peer Financial Coach positions for the **2021/2022 academic year.** Peer Financial Coaches provide free and confidential financial information and resources to IWU Students and our local community. The deadline for submitting your application and resume is **Friday, March 12, 2021**. Interviews will be held **March 18 - 23, 2021**.

Eligibility Requirements are as Follows:

- GPA of 3.2 or above
- Completion of Peer Financial Coach Training upon acceptance
- Strong communication and presentation skills
- Previous related course completion preferred
- Completion of defined coursework
- Ability to work at least 8 hours per week

Responsibilities of Peer Financial Coaches:

- Educate clients on personal finance alternatives and solutions through financial discipleship/one-on-one meetings
- Research different areas of finances
- Provide presentations on personal finance topics to students, classes, and student organizations
- Attend bi-weekly continuing education (CE) training sessions
- Read materials and complete coursework provided by NEXUS prior to training

Required Skills:

- Maintain client privacy and confidentiality and follow ethical principles
- Establish client relationships and build trust and rapport
- Demonstrate empathy
- Recognize nonverbal messages
- Demonstrate interviewing and listening skills
- Manage client expectations and maintain boundaries
- Handle questions for which you do not know the answer
- Resolve conflict, manage crises, and defuse anger
- Keep good records
- Educate clients on sound money principles, assist in the exploring their values, attitudes, beliefs, and behaviors around money, and provide tools & resources

Benefits of becoming a Peer Financial Coach:

- Use of your classroom skills and knowledge to educate students and the community about their personal finances
- Apply learned financial skills to your own life
- Apply hours toward partial fulfillment of the Certified Financial Planner Board of Standards, INC.***
- Obtain experience working under the direction of a nationally recognized program
- This is a paid position

Participation Requirements:

Once approved as a Peer Financial Coach, in order to maintain this status, the following minimum participation requirements must occur:

1. Complete Peer Financial Coach Training
2. Complete continuing education
3. Complete a minimum number of required coaching sessions
4. Fulfill office hours assigned

Application Information

Full Name:______________________________Student ID #: ______________________________

Address:____City: ___________________

State:________Zip Code:______________________Campus Mailbox #: ____________________

Phone:______________________________Email: _______________________________________

Date Available:______________________Desired Salary:________________________________

Are you bilingual? ☐ Yes ☐ No If so, what language(s) do you speak? _________________

Availability: Fall Semester Only ☐ Spring Semester Only ☐

Both Fall/Spring Semester ☐ Summer ☐

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
AM						
PM						

Expected Graduation Date: ____

Do you work on campus? ☐ Yes ☐ No Average number of hours/week _________

Do you work off campus? ☐ Yes ☐ No Average number of hours/week __________

Position Applied For: ____

Are you legally eligible to work in the U.S.? ☐ Yes ☐ No

Have you ever worked for this company? ☐ Yes ☐ No If yes, when? _______________

Have you ever been convicted of a felony or misdemeanor? Yes ☐ No ☐
If yes, explain: ____

Education

High School:____________________________Address: __________________________________

Did you graduate? ☐ Yes ☐ No GPA: ______

College:_____________________________Address: _____________________________________

Did you graduate? ☐ Yes ☐ No GPA: ______

Freshman ☐ Sophomore ☐ Junior ☐ Senior + ☐

Degree: ____

Have you taken the following classes: BUS 150? ☐ Yes ☐ No

BUS 250? ☐ Yes ☐ No

List other relevant classes that you have taken (e.g., Counseling, Marriage and Family Therapy):

____

Additional Educational Programs/Degrees: ______________________________________

Did you graduate? ☐ Yes ☐ No

Additional Educational Programs/Degrees: ______________________________________

Did you graduate? ☐ Yes ☐ No

References

Please list 2 Professional References & 1 Pastoral Reference:

Full Name:__________________________________Relationship: _______________

Company:___________________________________Phone: ___________________

Address: ____

Email: ____

Full Name:__________________________________Relationship: _______________

Company:___________________________________Phone: ___________________

Address: ____

Email: ____

Full Name:____Relationship: __________________

Company:____Phone: _______________________

Address: ____

Email: ____

Previous Employment

Company:____Phone: _______________

Address:____Supervisor: ____________

Job Title:____________________________Starting Salary:_________Ending Salary: __________

Responsibilities: ____

From:___________To:_____________Reason for Leaving: ________________________________

May we contact your previous supervisor for a reference? ☐ Yes ☐ No

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Company:____Phone: _______________

Address:____Supervisor: ____________

Job Title:____________________________Starting Salary:_________Ending Salary: __________

Responsibilities: ____

From:___________To:_____________Reason for Leaving: ________________________________

May we contact your previous supervisor for a reference? ☐ Yes ☐ No

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Company:____Phone: _______________

Address:____Supervisor: ____________

Job Title:____________________________Starting Salary:_________Ending Salary: __________

Responsibilities: ____

From:___________To:_____________Reason for Leaving: ________________________________

May we contact your previous supervisor for a reference? ☐ Yes ☐ No

Interpersonal Skills

Please rank the skills listed below from 1 to 10; 1 representing your best intrapersonal skill.

_____ Trustworthy

_____ Good Listening Skills

_____ Empathetic

_____ Professional

_____ Having Personal Finance Content Knowledge

_____ Honesty

_____ Willingness to Learn

_____ Nonjudgmental

_____ Ability to Coach and Teach

_____ Strong Verbal Communication Skills

Resources to Return

Please email the following documents all at one time to beth.white@indwes.edu.

Required Documents

- ☐ Nexus Financial Coach Application
- ☐ A Cover Letter
- ☐ A Current Resume
- ☐ All College Transcripts (Unofficial Transcript Accepted)

Optional Documents

- ☐ A Two to Three Minute Video answering one to two of the questions that follow:
  - How has your faith changed the way you view money?
  - What do you see is the most pressing financial issue facing students today?
  - If you could make one financial change from the time you left high school until now, what would that one thing be?
  - What is the earliest memory of money you can remember?
  - What is the most impactful financial lesson your parents taught you?
- ☐ Professional Letters of Recommendation

Disclaimer and Signature

I certify that my answers are true and complete to the best of my knowledge.
If this application leads to employment, I understand that false or misleading information in my application or interview may result in my release.

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Signature____Date ___________________