

Job Summary

Responsible for:

Counsel and educate pre-purchase homeownership clients on a one-on-one and/or group basis. Manage intake of all homeownership applications, process applications and prepare clients to be eligible for issuance of a grant certificate and for mortgage readiness. Work closely with other team members to organize outreach and present education seminars to maintain and grow the First time Homebuyer Education program. Efficiently process applications to ensure CHI grant contracts can be dispersed in a timely manner. Ensure all client files are audit ready for grant and funding compliance. This position is located in White Plains and workshops and seminars are presented to clients in Westchester and Long Island. Candidates must speak Spanish.

Education/Outreach

- Prepare and Modify PowerPoint for workshop presentation for potential 1st time homebuyers.
- Prepare and provide CHI brochures and other handouts during orientation and education seminars
- Schedule and present outreach seminars and first time homebuyers education classes , invite guest speakers
- Keep track of program inventory, such as brochures and other program documents
- Maintain a ledger keeping track of the number of individuals who register versus the number of attendees for all orientation, education seminars and specific lender sponsorship for annual reporting purposes.

First Time Homebuyer Counseling

- Review all grant applications to determine the eligibility of an applicant for a grant, to assist in the purchase of their first home. Conduct an eligibility and affordability analysis for every completed application that is submitted adhering to the PB 11B-IRS Form 1040 Income and Asset Guidebook for Homeowner Program Guidelines. Included but not limited to, the reviewing of credit report, income documentation, monthly household budgets, verification of employment and other relevant documentation required as part of the application review process.
- Provide face to face, phone or internet counseling to first time homebuyers. Prepare individualized action plans for clients as needed.
- Review and update the grant waiting list on a weekly basis
- Provide counseling to all First Home Club and Smartmove participants and oversees their application and progress for the duration of the program
- Evaluate and provide counseling to all eHome America student. Approve and or decline certificates.
- Submit lender invoices when applicable to CHI accounting Department
- Maintain all client files to ensure files are in compliance with HUD. Observe all regulatory and reporting requirements and ensure all files are audit ready
- Create a client/case profile utilizing the web based client management system, Counselmax.