



Senior Associate (Legacy Planning)

The [Cities for Financial Empowerment Fund \(CFE Fund\)](#) supports municipal efforts to improve the financial stability of households by leveraging opportunities unique to local government. By translating cutting-edge experience with large-scale programs, research, and policy in cities of all sizes, the CFE Fund assists mayors and other local leaders to identify develop, fund, implement, and research pilots and programs that help families build assets and make the most of their financial resources. Financial empowerment spans four key disciplines:

- Professional financial counseling;
- Access to safe and affordable mainstream banking products and services;
- Short- and long-term asset building; and
- Consumer protection in the financial services marketplace.

The CFE Fund is seeking a talented and experienced **Senior Associate** to support the integration of estate planning, or “legacy planning” within the [Financial Empowerment Centers \(FECs\)](#). FECs provide professional, one-on-one financial counseling as a free public service to enable residents to address their financial challenges and needs and plan for their futures. After a [multi-city pilot](#), the next phase of work is to expand and scale the within dozens of FECs. The Senior Associate will play a critical role in supporting program implementation, managing partnerships, and identifying opportunities for program growth and expansion. This role will collaborate with internal teams, external partners, and the FECs to ensure effective delivery of counselor-supported legacy planning services and help broaden the program’s reach. There are 32 cities and counties with municipally-led FECs, with dozens more municipalities in the planning process.

The ideal candidate will have experience leading program implementation, supporting partners, and handling a wide range of project management tasks, and will be able to work independently. This person must be exceedingly well organized, flexible, and enjoy the challenges of working in a small, entrepreneurial organization. Direct experience coordinating legal services (e.g., pro bono legal coordination, legal clinics), partnering with large social service programs or systems (e.g., workforce, free tax preparation), or working in local governments is highly valued, as is experience with partnership development and stakeholder engagement.

This is a Baltimore or New York City-based role, although exceptional candidates who must live elsewhere may be considered. New York City-based CFE Fund staff have the option of working in person from our NYC headquarters, or they may elect a hybrid office/remote work schedule with a minimum of 2 days in the office. Remote employees must secure their own work environments and travel approximately monthly to New York City to meet with teammates.

This position will require regular national travel.

Key Responsibilities:

- **Program Management Support:**
 - Coordinate the management of the legacy planning program’s daily operations, including the roll out of counselor-supported legacy planning services across 30+ existing and new Financial Empowerment Centers (FECs). This includes providing project management support to the legacy planning team by coordinating project timelines, tracking deliverables, ensuring program milestones are met in a timely manner, taking detailed meeting minutes, supporting internal team collaboration, coordinating across multiple workstreams, and supporting scheduling.
 - Prepare project updates and reports for internal and external stakeholders, including funders, consultants, and program partners.
 - Support fundraising efforts, contracting needs, and program budget management, including working internally with CFE Fund colleagues, providing necessary data and liaising with external stakeholders.
 - Support program-related event coordination, including virtual and in-person learning community events.

- **Partnership Management:**
 - Manage communication and coordination with external consultants, legal service providers, local FEC staff, and other key stakeholders to ensure seamless service delivery.
 - Identify and develop new partnerships to enhance program reach, improve service offerings, and explore opportunities for program growth.

- **Opportunities for Program Growth and Expansion:**
 - Work closely with the program team to identify new opportunities for expanding the legacy planning program’s services to additional FEC sites or new geographic areas.
 - Contribute to strategic discussions on program sustainability, scaling, and integration of new services into the existing FEC model.
 - Research emerging trends and best practices in financial empowerment, legacy planning, and legal services to help inform program innovations.

- **Training and Technical Assistance:**
 - Assist in the development and delivery of training materials for FEC counselors on legacy planning services, including both foundational and advanced topics.
 - Provide ongoing support to FEC sites as they implement legacy planning services, troubleshooting issues and ensuring adherence to program standards.
 - Support the CFE Fund team in training FEC counselors on legacy planning tools and legal service offerings, such as the use of will-generation software.
 - Help coordinate supplemental learning opportunities for FEC counselors and managers focused on legacy planning and related topics.

- **Monitoring, Reporting, and Evaluation:**
 - Track and analyze program data, including the number of counselors trained, clients served, and legacy planning documents completed.

- Support the preparation of periodic reports for a variety of stakeholders summarizing program performance, client outcomes, and key metrics.
- Collaborate with external consultants to monitor program progress and make data-driven recommendations for improvements.

Qualifications:

- Bachelor's degree in public administration, nonprofit management, human services, social work, or a related field, or at least six years of relevant experience in lieu of a degree.
- A minimum of five years of relevant experience in program support, project management, or partnership management, preferably within financial empowerment, legal services, or social services.
- Familiarity with legal services, financial empowerment, social service delivery, asset building, anti-poverty efforts, and/or community development.
- Strong organizational and project management skills, with the ability to manage multiple tasks, timelines, and stakeholders, as well as experience using project management tools, particularly Asana.
- Experience with grant-funded program implementation and reporting.
- Experience in data tracking, reporting, and program evaluation.
- Ability to take initiative, solve problems, and move projects forward in a fast-paced, collaborative environment.
- Advanced interpersonal and communications skills, with the ability to work closely with a wide range of constituents, including financial institutions, senior-level government partners, funders, internal staff, consultants, and community-based organizations.
- Experience supervising interns and/or external consultants preferred.
- Excellent attention to accuracy and detail.
- Excellent written, presentation and negotiation skills.
- Excellent time management skills; ability to multi-task and prioritize work.

The CFE Fund offers excellent benefits and competitive salaries commensurate with qualifications. The salary range for the Senior Associate title is \$70,800- 92,000 based on qualifications, worksite location, and team parity. The CFE Fund is an Equal Opportunity Employer. We seek applicants with diverse backgrounds and lived experiences that can help enhance our approach to supporting municipal financial empowerment efforts.

To apply, please email a resume and cover letter to info@cfefund.org. Please include "Senior Associate (Legacy Planning)" in the subject line.