



# NeighborWorks®

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## WACO

NeighborWorks Waco is looking for a qualified and driven person to join our team in the role of **HOMEOWNERSHIP PLANNER**. This role is responsible for counseling clients, including budget analysis, creation of financial action plans, mortgage lender/servicer negotiation, and other administrative duties related to this area.

**Role:** Homeownership Planner

### SCOPE OF RESPONSIBILITIES

- Process each application, verifying the accuracy and completeness of each document. Update data on computer system as soon as documents are received.
- Prepare, schedule, and conduct application intake and counseling sessions.
- Create corrective action plan and determine best loan resolution option for each client.
- Handle routine questions from clients.
- Assist in lender negotiation/communication when necessary.
- Communicate with clients as needed for additional documentation and follow-up to obtain documents.
- Obtain all financial documentation, performing income and asset analysis, debt-to-income ratios, and other related calculations.

### Benefits

401k contribution

Medical

Dental

Vision

HSA option

Annual bonus opportunity

Paid leave

Sick leave

Personal leave

Generous holiday leave

Financial literacy training

Consumer lending

### Starting Salary:

\$35,000+ Depending on qualifications and experience

- Maintain records, reports and files, including invoicing procedures for counseling performed.
- Review documents and determine eligibility for grants necessary for foreclosure assistance programs.
- Organize and assist in leading and teaching HomeBuyer Education courses
- Participate in outreach activities for potential clientele.
- Maintain confidentiality at all times for each client's personal information.
- Perform all other duties as assigned.

## QUALIFICATIONS

Qualifications to include, but not limited to:

Minimum of two years of progressively responsible experience in a related field. Other combinations of experience and education that meet the minimum requirements may be substituted. Knowledge of state and federal regulations governing the home-buying process, with the experience and capability of the following:

- Interpret complex rules and regulations to determine eligibility for loan resolution programs and/or grants.
- Work cooperatively with other NeighborWorks® Waco employees and the public.
- Communicate effectively with clients or the public in face-to-face, one-on-one settings, or using the telephone.
- Comprehend and make inferences from written material.
- Learn job-related material primarily through oral instruction and observation to effectively perform job duties. This learning takes place mainly in an on-the-job setting.
- Strong organizational, follow-up and file management skills are required.
- Professional demeanor is essential, along with strong written and verbal communication skills.
- Ability to work within deadlines

**Immediate Supervisor:** HomeOwnership Center Manager

## NEXT STEPS

If you are interested in joining our awesome team and growing personally and professionally as you help families throughout our community achieve their financial goals then send a résumé and cover letter to the Homeownership Center Manager at [cqualls@nw-waco.org](mailto:cqualls@nw-waco.org). We believe in getting the right fit into the role, so please reach out even if you feel you may not check every box or possess every qualification.

**Machines/Equipment:**  
General office equipment.

**Environmental Factors:**  
Works mostly in a climate controlled indoor environment.

**Other Requirements:**  
-Organization

-Timeliness

-Follow written and verbal instructions

-Time management

-HomeBuyer education training

**Contact:**  
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