BALANCE
Financially Empowering You

Become a trusted resource for financial guidance

Help your staff coach members to improve money management skills, provide guidance in credit and debt matters, and encourage positive change in financial behaviors.

MONEY COACH
by BALANCE

An immersive financial coach training program for your staff offered online through self-paced modules, or in a face-to-face classroom style setting.

Provide your staff with the tools needed to become personal finance coaches for your clients. With Money Coach, your team will receive the same world-class training that BALANCE financial coaches undergo.

Our comprehensive program includes:

- Pre and post-training exams
- Over 40 hours of training
- Materials cover 13 personal finance topics and training in soft skills (tone, empathy, rapport, serviceability)

A quick look at MONEY COACH:

Part 1:
Learner takes 104 question pre-exam to assess current knowledge.

- Administered online through BALANCE's Learning Management System, Docebo
- Duration: 2 Hours

Part 2:
Learner becomes proficient in 13 financial education topics.

Track 1
Online, self-paced modules through Docebo.

- Includes Learning Checks consisting of 5-10 questions per module
- Duration: 40 hours

OR

Track 2
Classroom style, face-to-face training with an instructor.

- Incorporates time for discussion
- Duration: 40 hours

Part 3:
Learner takes 104 question post-test.

- Administered online through Docebo
- Must score at least 80% to receive certificate*
- Duration: 2 Hours

Certificate renewal involves attending a minimum of 6 free webinars from BALANCE every two years.

13 Financial Education Topics:

- Basics of Money Management
- Basics of Credit & Debt
- Credit History and Credit Reports
- The Collection Process
- The Legal Process
- Bankruptcy
- Housing Issues
- Identity Theft
- Student Loans
- Taxes
- Child Support and Alimony
- Long-Term Planning
- The Art of Financial Counseling

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