

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

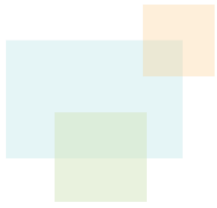
An immersive financial coach training program for your staff offered online through self-paced modules, or in a face-to-face classroom style setting.

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:



## 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

### 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.