

# Volunteering for the Financial Coaching Institute

The Financial Coaching Institute is a collaboration between the Financial Education Center and the University of Wisconsin-Extension. This 6-month program offers free and confidential financial coaching to help accepted applicants (“Partners”) manage their money and improve their financial futures. Coaching is given to individuals and families who request assistance in such topics as: starting and maintaining a budget, basic money management, savings towards a goal, understanding credit, and/or banking using traditional or alternative sources.

Coaching is not financial advising. Volunteers are not expected to be experts in finance, but rather to be supportive confidants, encouraging their Partner to achieve the financial goal laid out by that individual at the beginning of the program. Volunteers and Partners will be expected to attend monthly workshops facilitated by the Financial Education Center, and may also choose to keep in contact between monthly meetings. No experience is necessary, and training will be provided.

## ***If you are...***

- Willing to learn and teach financial management skills
- Sensitive to, and respectful of cultural differences
  - Organized and structured
  - Patient and determined
  - Reliable and consistent

***...then you can be a coach!***

## **2009-2010 Financial Coaching Institute Schedule:**

Tuesday, November 10, 2009	VOLUNTEER TRAINING	6:00-7:30pm
Wednesday, November 11, 2009	VOLUNTEER TRAINING	6:00-7:30pm
Wednesday, November 18, 2009	KICK-OFF & Workshop One: Budgeting	6:00-7:30pm
Wednesday, December 16, 2009	Workshop Two: Credit	6:00-7:30pm
Wednesday, January 13, 2010	Workshop Three: Banking	6:00-7:30pm
Wednesday, February 17, 2010	Workshop Four: Bankruptcy	6:00-7:30pm
Wednesday, March 17, 2010	Workshop Five: Saving for Education, Retirement	6:00-7:30pm
Wednesday, April 21, 2010	Graduation Celebration and Final Evaluations	6:00-7:30pm

For more information email Melissa Berger, [mberger2@wisc.edu](mailto:mberger2@wisc.edu)

# Financial Coaching Institute Volunteer Application

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Preferred Phone: \_\_\_\_\_

Alternate Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Are you over 18?:     YES         NO

What other languages do you speak, including American Sign Language (ASL)?  
\_\_\_\_\_

**Prior experience (optional):**

Secretarial/Reception

Counseling/Mentoring

Tax preparer

Financial

Teaching

Other \_\_\_\_\_

**Commitment:**

3-hour training course (two evenings)

2-hours per month for 6 months

Flexible scheduling

**STATEMENT:**

*The Financial Coaching Institute is a collaboration between the Financial Education Center and the University of Wisconsin-Madison. The program offers free and confidential financial coaching to help individuals and families manage their money and improve their financial futures. As a trained volunteer, you may work with individuals one-on-one on:*

*Starting and maintaining a budget*

*Savings toward a goal*

*Understanding credit*

*Basic money management*

*Banking ( traditional or alternative)*

*By completing this application, you agree to attend two 1.5 hour training courses, 1.5 hour orientation, and all coaching sessions. You understand that you will be matched with an individual in need of financial guidance, and you agree to work with your partner through the end of the program to provide support and encouragement as financial skills are developed. All trainings and workshops will be held at the Financial Education Center.*

Applicant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Please send completed application to:*

**Financial Education Center, 2300 S. Park Street, Suite 005, Madison, WI 53713, FAX 608-261-9727**

*Volunteering Questions? Email [mberger2@wisc.edu](mailto:mberger2@wisc.edu) or call the FEC 608-261-5077*