



Lesson 9 – Extension’s Role in Helping People with Money Issues Checklist for Completion of Unit

Please enter the date you completed each portion of the unit.

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Part I. Keys to Helping People

- Read *Financial Counseling: What, Who, When and Where*
- Watch video
- Read *Helping People with Money Issues*
- Submit answer to review question to instructor**

Part II. Steps in the Counseling Process

A. Determining Expenses

- Watch video
- Read *15 Steps Summarized*
- Submit answer to review question to instructor**

B. Financial Options-Increase Income-Decrease Expenses

- Watch video
- Read *Financial Options* handout from Lesson 1

C. Financial Options-Bankruptcy

- Watch video
- Submit answer to review question to instructor**

D. Ending a Session

- Watch video
- Read *Money Meetings* handout from Lesson 1

Part III. Extension’s Role in Helping People

A. Family Living Educators and WNEP

- Watch video

B. Programming

- Watch video
- Read *Logic Model for Planning and Evaluation*

Final Assignment

- Read *National Extension Money Management (Desired Outcomes and Guiding Principles)*
- Activity: Review the Financial Security in Later Life website
- Activity: Review Family Economic Security website
- Submit answer to final assignment to instructor**