

*The Financial Education Center presents:*

## **2010 Financial Coaching Clinic**

Do you have financial goals but trouble sticking with ‘the plan’? The Financial Coaching Clinic is a selective program to match you to a trained ‘coach.’ Your coach is not a financial advisor and has nothing to sell, but will help you keep track of your financial goals and work with you to reach your goals.

This 10 week program begins mid-February with weekly coaching workshops through April. The program requires about 30 minutes of your time per session, and you may choose to participate in as many or as few as you like. Workshops will be held at the Financial Education Center (FEC) at the Villager Mall, 2300 S. Park St. You can work on making and sticking to a budget, fixing your credit, paying off bills, increasing savings or a number of other topics.

A Certified Financial Planner<sup>®</sup> will be available to answer specific questions.

### **Program Benefits**

*As a participant, you will:*

- Work with a trained financial coach, one-on-one, for up to 10 weeks
- Reduce your stress and anxiety about money management
- Learn how to make your money work harder & smarter for you

**Do I Qualify?** *Applicants must have:*

- Identified a specific financial goal
- Willingness to take steps toward that financial goal
  - A commitment to financial improvement
- Ability to attend at least one coaching session

**2010 Schedule:**

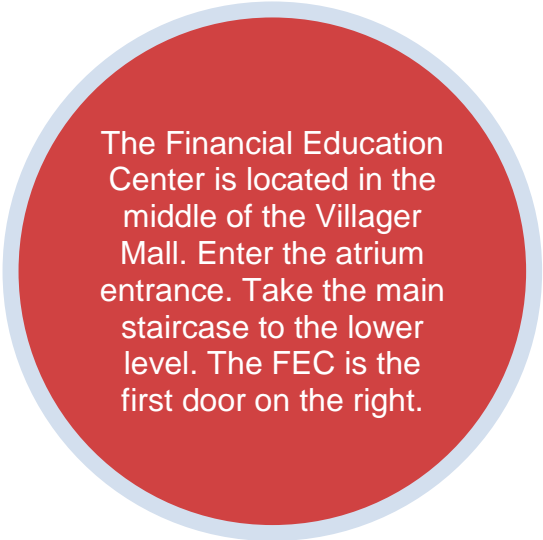
**Tuesday Workshops** Feb 16 – Apr 27\*  
Appointments available 5pm – 7:30pm\*\*

**Thursday Workshops** Feb 18 – Apr 29\*  
Appointments available 5pm – 7:30pm\*\*

\* There will be no workshop on Tuesday, March 30 or Thursday, April 1.

\*\* You will schedule a 30 minute appointment beginning at 5:00, 5:30, 6:00, 6:30, or 7:00pm

**All Sessions will be held at the Financial Education Center,  
2300 S. Park Street, Madison**



The Financial Education Center is located in the middle of the Villager Mall. Enter the atrium entrance. Take the main staircase to the lower level. The FEC is the first door on the right.

# 2010 Financial Coaching Clinic Application

## Coaching Participant Application Form

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

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

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

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

Employer: \_\_\_\_\_

### Best method of communication to reach you:

Home Phone

Work Phone

E-mail

Mail

### I would like a Coach to work with me on the following:

- Starting and maintaining a budget
- Basic money management
- Saving towards a goal
- Understanding credit
- Banking
- Homeownership and/or car loans
- Other

\_\_\_\_\_

***The 2010 Financial Coaching Clinic is a collaboration of:***

Local Board of Certified Financial Planners®



FINANCIAL OCCUPATIONS CLUB FOR UNIVERSITY STUDENTS



**UW-Madison's Center for Financial Security**

**2010 Clinic Dates:**

*Tuesdays, February 16 – April 27*

*5:00, 5:30, 6:00, 6:30, 7:00pm appointments*

*Thursdays, February 18 – April 29*

*5:00, 5:30, 6:00, 6:30, 7:00pm appointments*

**Contact Melissa Berger with Questions:**

VIA EMAIL: [mmberger2@wisc.edu](mailto:mmberger2@wisc.edu)

VIA PHONE: 890-3326