Central New Mexico Community College Financial Coaching Training

Coaching Training Description
The CNM Center for Working Families in collaboration with the New Mexico Project for Financial Literacy offers a dynamic, interactive coaching training that combines fundamental coaching skills with strong financial content. The course purposefully pairs coaching and financial content so that participants get immediate practice and feedback on their financial coaching skills. The course is highly interactive with coaching practice during the training and between the two training sessions. The intention of the course is for participants to leave with knowledge and tools that they will be able to easily integrate into their day-to-day work life. The training has been developed to train 25-30 participants during each session. The goal is for participants to attend the entire five days of training. Substitutions of different employees in the second half of the training are not allowed. For more details and a course agenda, see the information at the end of this form.

Financial Coaching Training Details
The financial coaching training was developed by CNM Achievement Coaches, Certified Financial Planners (CFPs) from the New Mexico Project for Financial Literacy and a certified coach. This team has over 100 years of coaching and training experience and is committed to developing a training that meets the needs of the CWF community that is fun, engaging and highly experiential. Below are the financial and coaching skills that are covered during the five day training.

Coaching skills

Accountability
Asking permission
Bottom lining
Boundary issues/family
Brainstorming
Challenging
Choice, planning, commitment
Clearing
Confidentiality
Curiosity
Designing the relationship
How to deal with clients in crisis
Intrude and take charge
Listening skills
Open vs. closed questions
Partnering with client to create financial goals
Power differential
Powerful questions
Problem definition
Reframing
Requesting
Saboteur
Smart goals
Speaking the truth
Trust
Values

Financial skills

Bankruptcy
Behavioral finance
Cash flow statement
Credit counseling
Critical thinking
Debt
Diversity / Money beliefs
Estate Planning
Foreclosure
Home Ownership/Vehicle purchase
Impact of career choice on financial status
Investing
Key ratios
Money and emotions
Money and family
Net worth statement
Repossession
Risk
Setting financial priorities
Social Security and Medicare retirement benefits
Using a financial calculator

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Agenda for Coaching Training

	Coaching content	Financial content
Day One (full day)	Overview of coaching Coaching foundations Listening skills Demonstration of coaching	Using a financial calculator Career choice as it impacts a person's financial situation Credit Critical thinking
Day Two (full day)	Coaching model Finding the topics Money and emotions Problem definition Coaching practice	Cash flow Net worth Behavioral Economics Debt Repossession Foreclosure Bankruptcy
Day Three (half day)	Smart goals Future self Coaching practice	Risk Using a financial calculator
Day Four (full day)	Values Clients in crisis Coaching practice	Home ownership Vehicle purchase Investing
Day Five (full day)	Boundary issues with family about money Choice, planning, commitment Greatest barriers Strengths and weaknesses demonstration and coaching practice	Money and family Cause and effect Social Security Estate planning
Day Six (half day)	Review of coaching content Creation of coaching integration plan	Review of financial content