

# Financial CHANGE Program 2010-2011

Free  
Coaching!

*Do you have financial goals but  
trouble sticking with “the plan”?*

If so, our Financial CHANGE program might be for you!

The Financial CHANGE Program provides individuals with support using **C**oaching, a **H**ands-on approach, **A**ccountability, **N**etworking, **G**oal Setting, and **E**ducation.

This program matches you (“the partner”) to a trained volunteer ‘coach’ from the community. 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 them.

## Program Benefits

*As a partner, you will:*

- Meet and work with a trained financial coach, one-on-one, for 6 months and attend monthly workshops (minimum of 2 hours per month)\*
  - Reduce your stress and anxiety about money management
  - Learn how to make your money work harder & smarter for you
- Receive certificate of achievement upon successful completion of the program

\*While the workshops will be held at the Financial Education Center (FEC) at the Villager Mall, 2300 Park St, your one on one sessions with your coach may be done via phone calls or emails. You can work on making and sticking to a budget, fixing your credit, paying off bills, increasing savings or a number of other topics.

**Call 608-283-1260 for more information!**

**Financial Education Center**



Center for  
Financial Security   
UNIVERSITY OF WISCONSIN-MADISON

# Financial CHANGE Program 2010-2011

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

- Identified a specific financial goal that can be reached within 6 months
  - A commitment to financial improvement
- Ability to attend at least SIX months of coaching sessions

## Coaching Partner Application Form

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

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

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

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

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

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

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

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

### Best method of communication to reach you:

- Home Phone
- Work Phone
- E-mail
- Mail

## Workshop Dates\*

October 21, 2010	6:00 – 7:30p.m.	<i>Kick-Off Meeting and “Emotions of Money”</i>
November 18	6:00 – 7:30p.m.	<i>Saving for a Goal</i>
December 16	6:00 – 7:30p.m.	<i>Spending Your Holiday Green without Going into in the Red</i>
January 20, 2011	6:00 – 7:30p.m.	<i>Saving/Spending Plans (Budgeting)</i>
February 17	6:00 – 7:30p.m.	<i>Your Credit in 2011</i>
March 17	6:00 – 7:30p.m.	<i>Saving for Life Events</i>
April 21	6:00 – 7:30p.m.	<i>6-Month Celebration / Motivational Speaker</i>
May 19	6:00 – 7:30p.m.	<i>Knowing Your Insurance Need</i>
June 16	6:00 – 7:30p.m.	<i>Electronic Banking</i>
July 21	6:00 – 7:30p.m.	<i>Saving/Spending Plans 2</i>
August 18	6:00 – 7:30p.m.	<i>Retirement</i>
September 15	6:00 – 7:30p.m.	<i>Estate Planning</i>

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

### Mail your completed application to Sutra Ginder at:

Financial Education Center, 2300 S Park Street Ste 101, Madison, WI 53713

Fax: 608-261-9727, or E-mail it to [Ginder@co.dane.wi.us](mailto:Ginder@co.dane.wi.us)

**Financial Education Center**



Financial Education Center

c/o Financial CHANGE Program at 2300 S Park St Ste 101, Madison WI 53713

<http://dane.uwex.edu/flp/FinancialEducation.htm>

Center for  
Financial Security



UNIVERSITY OF WISCONSIN-MADISON