

The Financial Education Center presents:

Financial Coaching Institute, 2009-2010

Do you have financial goals but trouble sticking with 'the plan'? The Financial Coaching Institute is a selective program to match you to a trained volunteer 'coach' from the community. Your coach is not a financial advisory and has nothing to sell, but will help you keep track of your financial goals and work with you to reach your goals.

This 6 month program begins in late October with monthly coaching workshops through April. The program requires about 90 minutes of your time per month. While the workshops will be held at the Financial Education Center (FEC) at the Villager Mall, 2300 S. Park St, you may exchange phone calls or emails with your coach over the course of the month. You can work on making and sticking to a budget, fixing your credit, paying off bills, increasing savings or a number of other topics. In April graduates of the Financial Coaching Institute will be honored at a certification ceremony.

Program Benefits

As a partner, you will:

- Meet and work with a trained financial coach, one-on-one, for 6 months
 - 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

2009 – 2010 Schedule:

Kick-Off and Orientation	Wednesday, November 18, 2009	6:00 – 7:30 p.m.
Group Sessions	Wednesday, December 16, 2009	6:00 – 7:30 p.m.
	Wednesday, January 13, 2010	6:00 – 7:30 p.m.
	Wednesday, February 17, 2010	6:00 – 7:30 p.m.
	Wednesday, March 17, 2010	6:00 – 7:30 p.m.
	Wednesday, April 21, 2010	6:00 – 7:30 p.m.
Graduation & Evaluation	Wednesday, April 21, 2010	6:00 – 7:30 p.m.

For more information email Jing jwang68@wisc.edu or Melissa mberger2@wisc.edu

Financial Coaching Institute Application

****Applications must be received by November 5, 2009.****

Do I Qualify? *Applicants must have:*

- Identified a specific financial goal that can be reached within 6 months
 - A commitment to financial improvement
 - Attend required interview
 - Ability to attend all coaching sessions

Coaching Partner 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

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

Send completed application to:

Financial Education Center
2300 S. Park Street, Suite 005
Madison, WI 533713

VIA FAX: Attn Melissa, 265-6048
VIA EMAIL: mmberger2@wisc.edu
Questions? Melissa 213-4601

Commitment Dates:

November 18, 2009
December 16, 2009
January 13, 2010
February 17, 2010
March 17, 2010
April 21, 2010