

Financial Coaching: Building a Future in Wisconsin
An Introductory Workshop
September 10, 2010
Madison Wisconsin

The Pyle Center
9:30 am-3:30 pm

Sponsored by the Center for Financial Security, UW-Madison, UW Cooperative Extension, and American Family Insurance

This one day workshop will bring national experts on financial coaching to Wisconsin to seed future coach training sessions and expand models in the state.

The event will provide an overview of financial coaching, models of delivering coaching, evaluation tools and an introductory train-the-trainer session. Registration costs: \$30 (Includes lunch and all workshop materials)

AGENDA

- 9:30 Welcome & Introduction
J. Michael Collins, Center for Financial Security, UW Madison
- 10:00 Coaching Models: A National Overview
Karen Murrell, Higher Heights Consulting & Annie E Casey Foundation
Financial Coaching Provider
- 10:45 Starting a Coaching Program: Panel Discussion
Deb Neubauer, Dane County Financial Education Center
Kristen Bruder, Dunn County Cooperative Extension
Nan Cnare, United Way of Dane County
- 12:00 Lunch at Pyle Center
- 12:45 Coach and Partner Experiences: Panel
Rob McCalla, CFP, Lecturer Personal Finance UW Madison
Kayla Nikula, Student Coach
Susan Gafner, Financial Education Center
Lisa Andrews, Financial Education Center
Peggy Olive, Richland County Cooperative Extension
- 2:00 Does it Work? Measuring Outcomes of Coaching
J. Michael Collins, Center for Financial Security, UW Madison
- 2:30 Learning to be a Financial Coach
Karen Murrell, Higher Heights Consulting
Peggy Olive, Richland County Cooperative Extension
Joan Sprain, St Croix County Cooperative Extension
- 3:15 Conclusion

