

# A|4 Financial Coaching Foundations Workshop

Tuesday & Wednesday, September 24 & 25 – Madison, WI

**UW-Madison Pyle Center  
702 Langdon St.  
Madison, WI 53706**

#### **Schedule:**

Tuesday, Sept. 24: Check-in & Refreshments  
8:30-9am / Workshop from 9am-4pm  
Wednesday, Sept. 25: Workshop 9am-4pm

### ***Help your clients build skills for lasting change with Financial Coaching!***

*University of Wisconsin trainers will provide a 2-day workshop on skills and strategies for financial coaches. This workshop is designed as an introduction to financial coaching and can also be used as a refresher to practice and advance coaching skills.*

**Don't wait to register!** Space is limited.

**Registration Fee of \$245** covers the 2-day training event; materials, lunch & refreshments included.

#### **In order to participate in this training:**

- Participants are expected to have a general knowledge of financial education in order to successfully complete this financial coaching training. Basic money management topics will not be covered in this workshop.
- Participants are expected to attend and complete both days of this workshop. Following the workshop, participants will receive 1.2 Continuing Education Units from the University of Wisconsin.

#### **This 2-Day Workshop Includes:**

- Coaching Definitions & Distinctions
- A|4Coaching Model and Framework
- Foundational Coaching Skills
- Creating a Road Map for Financial Well-Being
- Strategies for Goal Attainment
- Working with "Stuck" Clients
- Increasing Client Motivation
- Structuring Coaching Sessions and Follow-up
- Demonstration & Practice
- Coaching Toolkit
- National Financial Coaching Resources
- Evaluation Strategies

**TO REGISTER for this event:**

<https://go.wisc.edu/9y8m4q>

*For general questions call (608) 890-0229*