



National Association of Certified Credit Counselors

Certified Financial and Career Coach (CFCC) Outline

Keys to Financial and Career Coaching Success

Additional Curriculum Supplements

Emotional Intelligence 2.0 by Travis Bradberry & Jean Greaves
Motivational Interviewing by William R. Miller & Stephen Rollnick
Personal Finance by E. Thomas Garman and Raymond Fogue

License Code for MyPlan Career Coaching Software

Log-in for Mind Over Money Financial Coaching Software

Foreward

Introduction

A paradigm shift

Assessing your passion

Module I: Coaching Basics and Cultural Responsiveness

Unit 1: Coaching Competencies

Unit 2: The Coaching Process

Unit 3: Basic Tenets of Effective Coaching

Unit 4: Coaching Agreement

Module II: Effective and Productive Communication

Unit 1: Active Listening

Unit 2: Optimizing Communication by Understanding Personality Types

Unit 3: Asking Questions

Unit 4: Motivational Interviewing

Module III: Understanding and Facilitating Self-Reflection

Unit 1: Self-Determination Theory

Unit 2: Emotional Intelligence

Unit 3: Four Stages of Competence

Module IV: Addressing Client Needs

Unit 1: Clarifying Values

Unit 2: Identifying Personal Strengths and Weaknesses

Unit 3: Myers-Briggs Types and Decision Making

Unit 4: Solution-Oriented Problem Solving

Unit 5: Managing Change

Module V: Setting and Achieving Goals

Unit 1: Process and Outcome Goals

Unit 2: Basics of Goal Setting

Unit 3: How Personality Types Set Goals

Unit 4: Choosing S.M.A.R.T. Goals

Unit 5: Keys to Achieving Goals

Unit 6: Creating an Action Plan

Unit 7: An Unbiased Perspective

Module VI: Financial and Career Coaching

Unit 1: The Marriage Between Financial and Career Coaching

Unit 2: Introduction to Financial Coaching

Unit 3: Understanding Financial Habits

Unit 4: How Are Habits Formed?

Module VII: Financial Coaching Perspective

Unit 1: Financial Coaching Sessions and Financial Literacy

Unit 2: Banking Resources for Self-Sufficiency

Unit 3: Credit Cards and Evaluating Products and Offers

Unit 4: Mechanics of Credit Scores

Unit 5: Disputing Credit Reports

Unit 6: Identity Theft

Unit 7: Loan Qualification

Unit 8: Predatory Lending and Payday Loans – Dangers and Alternatives

Unit 9: Spending Plan Analysis

Unit 10: Creating the Action Plan

Unit 11: Useful Terms

Module VIII: Career Coaching Perspective

Unit 1: Career-Related Self-Assessment Tools

Unit 2: Employability Skills

Unit 3: Employability Skills Assessment

Unit 4: Matching Client Skills with the Right Job

Unit 5: Job Search

Unit 6: Useful Terms

Module IX: Professional Ethics in Coaching

Unit 1: Basic Tenets of Coaching Ethics

Unit 2: Professional and Business Ethics

Unit 3: Conflicts of Interest

Unit 4: Confidentiality

Unit 5: Crisis Intervention

Module X: Outreach, Engagement, and Data Collection

Module XI: Conclusion

Appendix A: Coaching Agreement

Appendix B: Managing Complex Change

Appendix C: Mind Over Money Slides

Appendix D: Career and Self-Awareness Inventories

Appendix E: Coaching Code of Ethics

Appendix F: Review Question Answers

Appendix G: Useful Resources

References

Live Seminar/Webinar Outline:

Experiential Learning:

- I. Solution-Focused Theory
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- II. Self-Determination Theory
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- III. Motivational Interviewing
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- IV. Active Listening
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- V. Client Centered
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- VI. Asking the right questions
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies
- VII. How we make decisions
 - a. Methods for Success
 - b. Putting It to Use
 - c. Case Studies

Case Scenarios for Financial and Career Coaching

- I. Pre-Bankruptcy Counseling
- II. Negotiating and Settling Debt
- III. Spending Plan Analysis
- IV. Consumer Proposals
- V. Self-Sufficiency / Basic Financial Literacy
- VI. Appropriate for a Debt Management Plan
- VII. Obtaining Affordable Housing
- VIII. College Planning
- IX. Career Planning

- X. Employment Planning
- XI. Adults in Transition
- XII. Entrepreneurs
- XIII. Income Tax, Investment, and Retirement Planning
- XIV. Managing Property Liability, Risk, and Health
- XV. Estate Planning
- XVI. Real Estate Planning

Creating the Action plan

1. Client driven goals
2. Measuring Progress