

Accredited Personal Finance Instructor® Learning Outcomes



This document contains the learning outcomes students will achieve through completion of the coursework.

Terminal Learning Outcomes (At End of Course, Learners Will:)

- Build a base-level professional foundation and plan
- Build relationships for programming opportunities
- Design a financial literacy program
- Refine the financial literacy program using data
- Grow their businesses and access funding

Building Your Base-level Professional Foundation & Plan

Enabling Learning Outcomes (At End of Module, Learners Will:)

- Understanding the reasons for starting a financial literacy program
- Defining your own mission; alignment with NFEC's mission; accomplish the shared mission
- Building a mission statement
- Understanding the effects of branding; establishing a brand
- Learn the best practices for financial literacy programs through research and case studies
- Establishing a professional business setting with phone, email, professional photo, business card or email signature
- Conduct an initial financial education program and report the results
- Establishing trust with potential clients by making sure your online presence is professional

Relationship Building for Programming Opportunities

Enabling Learning Outcomes (At End of Module, Learners Will:)

- Creating a professional image with credentials to back it up
- Understanding and establishing a target market
- Identifying current contacts who can collaborate to establish a market
- Establishing contacts with organizations that can benefit from financial literacy education
- Establishing contacts with organizations that can benefit from financial literacy education

Consultative Design Process & Program Approval

Enabling Learning Outcomes (At End of Module, Learners Will:)

- Demonstrate understanding of the content by answering comprehension questions.
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- Answer questions to determine the big picture of their potential program. This includes the goals of the organization, type of audience, constraints, and growth plan.
- Learn how each measurement tool works and how it helps them get to know a potential client and its audience.
- Determine which measurement tools they will use to assess the needs of a client before, during, and after their program. Determine what and how they will track behavior changes, and come up with educational, organizational, and philanthropic goals.
- Determine the benefits and challenges that their program will face, and determine who they will be working with within the organization.
- Determine what types of pretests and surveys they will give to a potential audience. Analyze the answers to the pretests and surveys and determine the needs and goals of the audience.
- Determine what considerations need to be made when choosing and setting up the venue for an event.
- Write a budget for the event, making sure to consider everything from refreshments to materials.
- Answer questions to determine the fine details of the program.
- Using all of the data that is gathered, they will construct a slideshow that highlights all of the details of the program.

Program Execution & Reporting

Enabling Learning Outcomes (At End of Module, Learners Will:)

- Demonstrate understanding of the content by answering comprehension questions.
- Create a promotion piece with a focus on why participants should attend the workshop, potential benefits, and why financial literacy is important 111. 111 Write several emails that will remind participants of date, location, and other key details of the event.
- Plan the logistics of promotions of the event, considering the who/what/when/where/how.
- Plan the details of the event by determining specifics about venue, tech needs, registration systems, insurance needs, third-party suppliers, printing details, approvals, training, and how to deliver the pre-programming tests and surveys.
- Complete a checklist to make sure everything has been considered and done for the upcoming event.
- Answer questions to decide how to motivate, engage, educate, and drive the audience to move to action.
- Gather positive results with data, visuals including pictures and videos of the event, testimonials, positive feedback, and any third-party recognition.
- Create a student certificate to recognize the completion of the program.
- Complete Reporting Template with all the information on your program. This is your final report you that demonstrates your completion and comprehension of the full training program.