



Rating Checklist: Financial Coach Training Programs

In your search for a financial coach training program, it's best to objectively track the solutions that can help your business or initiative thrive. Use this complimentary form to compare other financial education programs with the NFEC Personal Finance Coach Program.

Compare NFEC Coaching versus Other Programs

Training & Certification	NFEC	Other 1	Other 2	Notes
Total Training Hours	180			
Observation of Coaching Sessions	✓			
Practice with Peers (virtually)	✓			
Accredited Organization	✓			
Coaching Standards	✓			

Client Support Resources	NFEC	Other 1	Other 2	Notes
Financial Coaching Software	✓			
Client Education Resources	✓			
Client Experience Resources	✓			
Client Communications	✓			
Assignment & Accountability Tools	✓			
Goal & Prioritization Worksheets	✓			

Compare NFEC Coaching versus Other Programs

Marketing & Promotion Resources	NFEC	Other 1	Other 2	Notes
Physical Marketing (Brochures, etc.)	✓			
Social Media (Infographics, Text-based Posts)	✓			
Online Marketing (Visuals, Copy)	✓			
Referral Systems (Process, Materials)	✓			
Advocacy Promotions	✓			
Financial Education Program	✓			

Certification Organization Marketing & Promotions for Graduates	NFEC	Other 1	Other 2	Notes
Featured Coach's Spotlight Webpage	✓			
Featured in Certifying Body Social Media Accounts	✓			
Featured Listing in Coaching Directory	✓			
Featured on Compliance Webpage	✓			
Local Market Directory Listings	✓			
Client Leads Provided to Graduates	✓			

Compare NFEC Coaching versus Other Programs

Business & Revenue Resources	NFEC	Other 1	Other 2	Notes
Business & Revenue Resources	✓			
Brand & Positioning Training & Resources	✓			
Coaching Business Models Training	✓			
Financial Education Revenue Options	✓			
Pricing Models Training & Sample Pricing	✓			

Complete Website & Conversion Cycles	NFEC	Other 1	Other 2	Notes
Full Custom Website	✓			
Website with Built-in Lead Computer Systems	✓			
Communications for Automated Emails	✓			
Conversion: Credit Card Processing Embedded	✓			

Guarantee	NFEC	Other 1	Other 2	Notes
Best Program Guarantee	✓			
1-year Guarantee Per Terms	✓			