<table>
<thead>
<tr>
<th></th>
<th>Training Outline &amp; Table of Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Introduction</td>
</tr>
<tr>
<td>02</td>
<td>Content Knowledge</td>
</tr>
<tr>
<td>03</td>
<td>Financial Coaching Standards &amp; Code of Conduct</td>
</tr>
<tr>
<td>04</td>
<td>Psychological Aspects of Financial Coaching</td>
</tr>
<tr>
<td>05</td>
<td>Coaching Process, Strategies &amp; Skill Building</td>
</tr>
<tr>
<td>06</td>
<td>Understanding Clients</td>
</tr>
<tr>
<td>07</td>
<td>Diagnosing Clients Situation</td>
</tr>
<tr>
<td>08</td>
<td>Goal Setting, Prioritization &amp; Action Steps</td>
</tr>
<tr>
<td>09</td>
<td>Education, Guidance &amp; Accountability</td>
</tr>
<tr>
<td>10</td>
<td>Financial Education Principles for Coaches</td>
</tr>
<tr>
<td>11</td>
<td>Counseling &amp; Psychotherapy Approaches to Financial Coaching</td>
</tr>
<tr>
<td>12</td>
<td>Progress Tracking &amp; Plan Modifications</td>
</tr>
<tr>
<td>13</td>
<td>Recap, Final Exam &amp; Certification Requirements</td>
</tr>
</tbody>
</table>
Welcome
  - Welcome
  - Overview & Graduation Requirements

Pre-course Measures: Surveys & Testing
  - Introduction
  - Course Pre-test
  - Coach Survey & Information

Coaching Vision & Objectives
  - Introduction
  - Shared Mission & Objectives
  - Warm Up Activities: KWR & VIQQS
  - Personal Benefits of Coaching
  - Mental Imagery

Course Preview & Visual Education
  - Introduction
  - Preview Methods: Crib Notes & THEIVES
  - Visual Education

Case Method
  - Introduction
  - Case Study Warm Up Activities
  - Personal Case Method
Introduction

Financial Coaching Overview
- Introduction
- What is a Financial Coach
- Skill Sets Financial Coaches Develop
- Impact of Financial Coaching
- Services Financial Coaches Provide
- Financial Coaching vs Financial Services and Education
- Problems in the Financial Coaching Industry
- Practice Standards of Distinguished Financial Coaches
Content Knowledge

- Introduction
- Savings, Expenses & Budgeting
- Account Management & Financial Team
- Loans & Debt
- Credit Profile
- Income
- Basic Economic & Government Influences
- Basic Risk Management & Insurance
- Basic Investing & Personal Financial Planning
Financial Coaching Standards & Code of Conduct

- **Introduction**

- **Ethical Standards**
  - Fiduciary Standards
  - Coaching Role
  - Financial Coaching vs Financial Advising
  - Security
  - Recordkeeping
  - Addressing Issues

- **Practice Standards**
  - Defining Client Relationship
  - Disclosure
  - Understanding Clients
  - Benchmarks
  - Client Education
  - Modifications

- **Professional Standards**
  - Professionalism
  - Continuing Education
  - Fiduciary Evaluations
  - Representation
  - Marketing

- **Safeguard Rule Training**
  - Safeguard Rule Introduction
  - Safeguard Rule General Requirements
  - FTC Safeguard Rule Overview
  - Employee Management & Training
  - Information Systems
  - Detecting and Managing System Failures
  - Project-based Learning
Psychological Aspects of Financial Coaching

- Introduction

- Understanding Common Financial Influencers
  - Overview Page
  - Common Financial Situations
  - How Financial Behaviors Are Formed
  - How Financial Sentiment is Formed
  - Common Levels of Financial Education
  - Common Money Management Systems

- Financial Psychology
  - Introduction
  - Needs, Emotions, Money, & the Connection
  - How Financial Behaviors & Attitudes Form
  - Identifying Your Financial Behaviors
  - Molding Positive Financial Behaviors
  - Turning Dreams Into Goals & Plans
  - Post Education Case Studies

- Behavioral Finance
  - Behavioral Finance & Financial Coaching Introduction
  - Emotional and Social Factors of Behavioral Finance
  - Biases Involved in Personal Finance
  - Additional Behavioral Finance Aspects of Personal Finance
  - Strategies for Financial Coaches & Educators
Coaching Process, Strategies & Skill Building

- Introduction

- New Client Onboarding & Environment
  - New Client Onboarding & Environment Introduction
  - Setting Up Client Communication Systems
  - Creating a Professional Onboarding Experience
  - Creating a Professional Coaching Environment

- Customizing the Coaching Program & Process for Clients
  - Customization: Types of Clients
  - Customization: Services Ordered or Offered
  - Time Allocation Overview Based on Total Coaching Time
Understanding Clients

- Introduction

- Skills Needed to Understand Your Client
  - Intrapersonal Skills to Help You Understand Your Client
  - Listening Strategies
  - Interview Techniques & Style

- Information Gathering Processes, Questions & Details
  - Introduction
  - Understanding Clients: Needs, Goals & Psychology

- Income, Savings & Assets
  - Income
  - Savings
  - Assets

- Housing Expense, Loans & Debt, Budget Preparedness
  - Housing Expenses
  - Loans & Debt
  - Budget Preparedness

- Money Management, Systems & Team
  - Credit Profile
  - Taxes
  - Accounts, Team, & Systems

- Assets: Protection, Planning & Growing
  - Risk Management & Insurance
  - Investing & Personal Financial Planning

- Project-based Learning
  - Project-based Learning
  - Personal Coaching Activity 1: Understanding Your Personal Financial Situation
Diagnosing Clients Situation

- Introduction to Diagnosis
- **Diagnosing Clients Situation**
  - Diagnosis Manual Training
  - Project-based Learning – Personal Diagnosis
  - Personal Coaching Activity 2: Diagnosing Your Personal Financial Situation
Goal Setting, Prioritization & Action Steps

- Introduction

- Goal Setting, Prioritization & Action Steps
  - Goal Setting Process with Clients
  - Prioritization of Goals
  - Breaking it Down Goals into Action Steps
  - Personal Coaching Activity 3: Prioritization & Goal Setting
Education, Guidance & Accountability

- Introduction

- Education, Guidance & Accountability
  - Educational Resources Overview
  - How to Assign Education Lessons
  - Important lessons to assign early
  - Review Activities & Provide Feedback
  - Providing Accountability
  - Personal Coaching Activity 4: Assign Education & Action
  - Personal Coaching Activity 5: Holding Yourself Accountable & Support
Financial Education Principles for Coaches

- **Introduction**

- **Outcome Measures**
  - How to Quantify Content Knowledge
  - Participant Impact & Behavior Change
  - Transtheoretical Model of Behavior Change
  - Financial Psychology
  - Money & Emotions

- **Financial Literacy Education Essentials**
  - Personal Finance is a Unique Subject
  - Connecting Financial Literacy to Lifestyle
  - Communication Strategies

- **Learning Process**
  - The Brain & Learning
  - Communication Techniques to Pass Brain Filters
  - Learning Styles & Interest

- **Sales Process for Teaching Personal Finance**
  - Sales Process: Overview
  - Sales Process Phase 1: Preparation
  - Sales Process Phase 2: Listening & Rapport
  - Sales Process Phase 3: Offer Solutions
  - Sales Process Phase 4: Take Action
  - Sales Process Phase 5: Feedback
  - Sales Process: Wrap Up
Financial Education Principles for Coaches

- **Teaching Method Essentials**
  - Teaching Method Essentials: Motivate
  - Teaching Method Essentials: Engage
  - Teaching Method Essentials: Educate
  - Teaching Method Essentials: Move to Action

- **Educator Style**
  - Educator Style: Authentic Voice
  - Educator Style: Language & Tone

- **NFEC Lesson Plan Methodology**
  - Understanding the Learner
  - Introductions
  - Warm-up Activities
  - Educational Reasons
  - Visual Education
  - Lesson Previews
  - Learner-led Education: Case Method
  - Skill-building Activities
  - Lectures
  - Project Based Learning
  - Ongoing Education
Counseling & Psychotherapy Approaches to Financial Coaching

- Introduction

- Counseling & Psychotherapy Approaches to Financial Coaching
  - Counseling & Psychotherapy Approaches for Financial Coaches
  - Drawing the Line Between Coaching and Licensed Counseling Professionals
  - Psychodynamic Approach
  - Behavioral Approach
  - Humanistic Approach
  - Transformative Learning Theory in Financial Coaching
Progress Tracking & Plan Modifications

- Introduction

- Progress Tracking & Plan Modifications
  - Framework for Measuring Coaching Program
  - How to Track Client Results & Outcomes
  - Client Reports
  - Re-planning Process
  - Personal Coaching Activity 6: Progress Tracking & Plan Modifications
Recap, Final Exam & Certification Requirements

- Introduction
- Recap, Final Exam & Certification Requirements
  - Upload Your Projects
  - Background Check Information
  - Testing Recap & Preparation
  - Register for The Exam