

Become a Volunteer Financial Coach

**No financial knowledge
necessary! Training provided!**

Are you interested in volunteering
your time to help others:

- clarify financial issues?
- by empowering clients with information, education and guidance?
- pursue financial goals?

The WalCo Financial Coaching Program is currently recruiting caring, empathetic adults who are willing to work one on one with Walworth County consumers.



**UW
Extension**

University of Wisconsin-Extension

**The Financial Coach Training:
Coaching Basic scheduled
dates are:**

- Two Friday Afternoons
July 13 and 20
1-3 pm in Elkhorn
- Two Tuesday Mornings
July 24 and 31
9-noon in Elkhorn
- Two Evenings
Monday, July 30
Tuesday, July 31
5:30-8:30 pm in Elkhorn

Cost:

- Free to volunteer financial coaches
- Agencies and businesses that wish to have trained financial coaches: \$20 per coach (cost included refreshments, training and materials)

Registration required: Call the UW-Extension at 262-741-4961 or email at amanda.kostman@ces.uwex.edu

If you are interested in coaching but are not able to attend any of these trainings, please contact of office to receive information when additional trainings become available.

WalCo Volunteer Financial Coach Position Description

General Description: Volunteer Financial Coaches agree to complete the Volunteer Financial Coach Training and provide one-on-one coaching for individuals/families that are seeking to accomplish financial goals.

Nature of Position: The volunteer receives 6 hours of training in the financial coach process, basic money management, strategies for dealing with financial problems, credit and debt management, savings, coaching and goal setting techniques and community resources. Some home study may be required. Following the training, each volunteer agrees to provide volunteer budget coaching with at least two individuals/families within one year of completion of training.

Responsibilities:

- Assist individuals and families to analyze their financial situation and generate goals and action strategies to improve their financial situation.
- Practice effective communication and goal setting/coaching skills to interact with individuals and families in a respectful, nonjudgmental manner.
- Understand the uniqueness of an individual's attitudes, beliefs and values regarding money.
- Be familiar with a variety of financial education tools and community resources that may be useful to individuals and families.
- Complete volunteer activity reports and return them to the Walworth County UW-Extension Office.
- Promote the UW-Extension as an educational resource.

Qualifications:

- Ability to work with individuals in a respectful and non-judgmental manner.
- Good communication and interpersonal skills.
- Sensitivity to and respect for individual differences.
- Ability to maintain participant confidentiality and trust.
- Able to volunteer to provide budget coaching for at least two individuals/families within one year of completion of training.
- Ability to attend all training sessions
- Access to a telephone and transportation
- Commitment to follow the coaching recommendations and avoid implying endorsement of any financial institution or product.
- Fill out the Walworth County Volunteer Application found at http://www.co.walworth.wi.us/information_links/VolunteerResources.aspx

Benefits:

- Receive up-to-date training and materials on financial management for personal use.
- Learn and build new skills.
- Become a member of a working team providing a valuable service to individuals and families in the community.
- Perform a valuable service to families in the community.



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Requests for reasonable accommodations for disabilities or limitations should be made prior to the date of the program or activity for which it is needed. Please do so as early as possible prior to the program or activity so that proper arrangements can be made. Requests are kept confidential.