AFCPE®
Webinar Training

Association for
FINANCIAL COUNSELING • PLANNING • EDUCATION
Agenda

Background
Membership
Certification
Financial counseling
Financial Coaching
Get connected
History

Started in 1983

First conference 1984
- AFCPE formally launched
- Bylaws adopted

AFC program launched 1992

Mission statement 2001
AFCPE

Annual Symposium
Professional Certification
Professional Membership
Membership

Semi-annual research journals
Quarterly newsletters
Annual Symposium
Trainings
FPA Connect community
Symposium

Cutting edge research
Training
Resources
Best practices
Networking
Continuing Education Credits
Certification

Accredited Credit Counselor\textsuperscript{SM} (ACC\textsuperscript{SM})
- (Restricted to non-profit agencies)

Accredited Financial Counselor\textsuperscript{®} (AFC\textsuperscript{®})

Certified Housing Counselor\textsuperscript{®} (CHC\textsuperscript{®})

Accredited Financial Counsellor\textsuperscript{®} Canada (AFCC\textsuperscript{SM})
Accredited Financial Counselor

Self-study or University Approved Programs

Two courses
  - Financial Counseling/Debt Management
  - Personal Finance

1,000 hours financial counseling experience
Certified Housing Counselor

Self-study or University Approved Programs

Three courses

- Financial Counseling/Debt Management
- Personal Finance
- Housing

1,500 hours financial counseling experience
MAINTAINING CERTIFICATION
Renewal Process

1. Pay the certification fee **each year**

2. Continuing Education Units (CEUs) each reporting period
Financial Counseling

Comprehensive

Foundation

Life cycle financial education
Financial Coaching

Client-centered goal setting
Accountability between client and coach
Focused on behavior change
Client and coach co-create relationship
How can financial coaches and financial counselors work well together to better meet the needs of clients?
Financial Coaching Standards

Pilot Model
Competencies
Techniques
Standardized curriculum
Get Connected

AFCPE Certified Professional Search
Job Opportunities page
CEU Library
Publications
Community
  - Social media: Facebook and LinkedIn
  - Blog
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