

The background of the slide features a large, faint, light blue logo consisting of several overlapping, curved lines that form a stylized, abstract shape, possibly representing a globe or a network. The logo is centered and occupies most of the slide's area.

**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<sup>SM</sup> (ACC<sup>SM</sup>)

- (Restricted to non-profit agencies)

**Accredited Financial Counselor<sup>®</sup> (AFC<sup>®</sup>)**

Certified Housing Counselor<sup>®</sup> (CHC<sup>®</sup>)

Accredited Financial Counsellor<sup>®</sup> Canada  
(AFCC<sup>SM</sup>)



# 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?**

**INTEGRATION**

# 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





Rebecca Wiggins  
Executive Director  
AFCPE  
(703) 684-4484 ext. 1  
rwiggins@afcpe.org  
[www.afcpe.org](http://www.afcpe.org)

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