Certified Professional
FINANCIAL COACH™

Continuing Education Handbook

September 2020

Welcome

To ensure the integrity of all Certified Professional Financial Coaches™, renewal of certification is required once every 12 months, starting upon the date of certification.

Your responsibility as a renewing Certified Professional Financial Coach™ will be to:

- Demonstrate reinforcement and expansion of a full spectrum of personal finance and coaching knowledge and skills
- Participate in ongoing professional development activities and lifelong learning
- Engage in continuing education and professional activities that expand learning opportunities and promote competency (12 total continuing education units (CEU)/ contact hours per 12 months of certification from original date of certification)
- Record your achievements as they are experienced
- Keep proof of CEU activities
- Pay your annual recertification fee of $99 by clicking here

Late Fees: A grace period is available until one month following the certification anniversary date. Late fees of $25 per month will be incurred for each month that a recertification fee is not paid. After six months of non-payment, your certification will be revoked.

Accepted Continuing Education Types and Requirements

Examples of accepted continuing education topics can be found below:

• Money mindset • Behavior training • Budgeting • Social media marketing training • Other marketing training • Debt payoff • Tax planning • Advanced financial concepts • Business development courses • Accounting/ bookkeeping	**• Housing • Education theory and skill development • Financial principles • Blogging/ podcasting • Sales training • Coach training • Financial or business based secondary education classes • *Other topics based on approval**

Accepted Continuing Education Types and Requirements

CEU Type	Activity	Maximum CEU Credits Allowed
Financial Coaching Symposium	**Attendee**	**12 (one credit per contact hour)**
Financial Coaches Roundtable	**Attendee**	**12**
Other industry conferences	**Attendee**	**12 (one credit per contact hour)**
Roadmap to Profitability VIP Day	**Attendee**	**6 hours**
Inspired Grace Retreat	**Attendee**	**6 hours**
On-the-job training	**Personal finance workplace training that enhances knowledge or skills as a Certified Professional Financial Coach™** *Training regarding an organization's operations, policies and procedures do not apply.*	**6**
Local professional financial training	**Participant**	**6 (one credit per contact hour)**
Webinars	**Participate in web-based financial trainings with instructor**	**6 (one credit per contact hour)**
Education	**College level personal finance course**	**6 (one CEU per credit hour)**
Professional designations	**Additional professional designation or certification**	**Varies (contact director of certification for allowance)**
Article review	**Write an scholarly journal review of study and post it to Financial Coaches Unite Facebook group** *Must be scholarly article not popular media source*	**2 articles for 4 hours**
Certified Professional Financial Coach™ initiated CEU opportunities	**Participant**	**10 (one credit per contact hour)**

Other	**Participant**	**Varies (contact director of certification for allowance.)**

Accepted Continuing Education Types and Requirements

The Certified Professional Financial Coach™ continuing education tracking form can be found here. Final approval of all continuing education units require proof of participation for CEU credit. Submit certificate of completion, proof of attendance and/or Certified Professional Financial Coach™ CEU affidavit form if proof of contact hours aren't available.

Continue Education Unit Submission Instructions

You will be required to manually record and track your CEUs over the course of your certification. All twelve CEUs and proof of participation must be submitted by 12:00pm MST on the recertification date. Follow these steps to ensure your CEUs are properly recorded and submitted so there will be no delay or fees involved in your recertification.

1. Keep track of all of your CEUs in the Certified Professional Financial Coach™ continuing education tracker spreadsheet HERE
    a. When you participate in a CEU activity put the details of said activity in the spreadsheet including date, title, contact/ CEU hours
2. Keep proof of CEU participation to affirm your participation
    a. Accepted proof of participation
        i. Certificate of completion
        ii. Proof of participation
        iii. Certified Professional Financial Coach™ affidavit of completion form
    b. If the CEU proof of participation form you submit does not report contact hours you must also submit the Certified Professional Financial Coach™ CEU affidavit to affirm the number of contact hours.
    c. It is also acceptable to create your own proof of participation certificate with notation of contact hours and have the instructor or facilitator sign off on the form
3. Accumulate 12 CEUs over the course of your year of certification
4. Submit the CEU tracker spreadsheet and all proof of participation files to info@certifiedprofessionalfinancialcoach.com by midnight MST of your recertification date. Only submit all required documentation when 12 CEUs have been completed.

If you have any questions, please contact director of certification, Michael Dickey, at (480) 788-4588 or info@Certified Professional Financial Coach™.com

The Certified Professional Financial Coach designation will test and validate your proficiency in the three pillars of financial coaching:

- Business acumen

- Financial skills
- Coaching skills

Financial coaches that want to hold themselves to the highest standards must master these three pillars to maximize their business processes and provide the best coaching possible for their clients. This process can take up to a year to complete so pace yourself.

Eligibility & Requirements for Applying (Basic):

Requirements for eligibility have been developed to ensure that the application process is fair for all applicants. Each requirement has been established to ensure that individuals certified as Certified Professional Financial Coaches have a superb level of knowledge and proficiency necessary to provide financial coaching services. To earn the Certified Professional Financial Coach™ designation, all candidates must:

Enrollment Dues and Application:

- Pay the registration fee
- Complete the application form

Educational Requirement:

- Complete the Financial Coach Academy Self-Paced or Live Financial Coach Academy course. You can apply for certification after you have completed the course or in conjunction as you complete the course. Because the Financial Coach Academy is the educational component of the Professional Financial Coach Certification it is recommended that you complete at least 75% of the FCA before you attempt the certification process. Once you apply for certification, you have 12 months to submit your application and complete all requirements, including the course itself.

Experience Requirement:

- Answer, submit and pass the Short essay questions
- Submit and pass review of the required supplemental business forms
- Have three (3) previous clients submit testimonials using the supplied online form
- Submit two (2) case studies of clients you have worked with for at least 3 months.
- Submit and pass proof of coaching 10 clients (minimum of 6 paying clients)
- Pass the multiple choice examination
- Submit and pass your "Why" Video

Continuing Education:

- Complete Annual continuing education requirements

The requirements above can be met before or during your application window (12 months from date of applying). Certification will not be granted until all requirements have been completed successfully.

Final Certification:

- Adhere to the Certified Professional Financial Coach™ Code of Ethics
- Annual renewal along with proof of Continuing Education requirements and the $99 renewal fee

Eligibility & Requirements for Applying (Detailed):

Within the course you will find modules with detailed instructions, checklists, grading criteria and scoring rubrics, submission links and more. Google Forms and/ or Dropbox submission links will be used for submission of all materials and examinations.

You can complete these modules in any order but do not submit until that section is 100% finalized on your end. Again, the modules can be completed in any order. It is the responsibility of the applicant to comply with all procedures and deadlines to establish eligibility to receive the Certified Professional Financial Coach™ designation.

The modules and a complete description are as follows:

- Introduction and instructions
- Short essay
- Case study
- Supplemental business forms
- Client testimonials and proof of ten clients
- "Why" Video
- Multiple choice
- Next steps

Welcome, Introduction and Instructions

Here you will find a welcome video, detailed instructions, checklists and additional information about the entire certification process. Candidates will receive confirmation that their enrollment has been processed, along with other critical communications, via email, therefore, it is vital to ensure that the correct email address is included on the enrollment form.

Short Essay

The purpose of the short essay is to ensure you understand and apply the three pillars of financial coaching to your business. Each question will ensure that your business processes and systems are in place and that you show proficiency in financial skills and coaching skills.

Case Studies

You will be required to provide three case studies of clients that you have coached for at least 3 months. You will be asked to talk about your process from the moment they first came in contact to them until the end of their first 90 days of coaching.

Supplemental Business Forms

For this module you will be required to submit multiple business materials to prove that you are maximizing your business potential and showing professionalism. These include but are not limited to: business fliers, website link, scheduling page link, discovery (Eureka) session client end paperwork/ spreadsheets, etc.

Client Testimonials

You will be required to have testimonials completed by 3 clients. An online form is available for you to share with the 3 clients you are considering as your testimonials.

You will also be required to submit proof of coaching 10 clients that you have worked with for at least 90 days. There is an online form for you to complete to present

"Why" Video

You must submit a video recording of you telling your "Why" story to show excellence in it's crafting, message and delivery.

Multiple Choice Examination

You will take a 100 question multiple choice examination to test your competency in all three pillars of financial coaching.

Timeline for Completion

All requirements for certification must be completed and submitted for review 1 year (12 months) from the date of your application. If you do not complete all of the necessary requirements within twelve (12) months of your initial application, you will be required to re-register and pay the complete registration fee.

Support, Feedback and Mentorship

With your application and enrollment fee, you will also receive 1 year of monthly virtual support with industry leading financial coaches.You will gain access to a private Facebook group for current and potential Certified Professional Financial Coach™ candidates.

Module Completion & Submission

Modules can be completed in any order. Upon submission of each module, please allow up to 2 weeks for grading. Once your material has been graded, you will receive a score sheet and be notified if you have passed or failed that module. You will get one free retake per module except for the multiple choice examination which will incur a $99 retake fee. Subsequent retakes for all modules will incur a $99 retake fee.

Eligibility Appeals/Denial

A candidate whose eligibility has been denied may appeal the decision.

Appeals regarding examination eligibility must be submitted in writing to the Certification Director via email to info@Certified Professional Financial Coach™.com or via mail to Certified Professional Financial Coach™™ Eligibility 333 E Cullumber Ave, Gilbert, AZ 85234. The appeal must be submitted in writing within thirty (30) calendar days of the decision or notification. The submission must including: 1) The nature of the request and the specific facts and circumstances supporting the request, and 2) all reasons why the action or decision should be changed or modified, and 3) accurate copies of any relevant supporting documents. A decision will be made within fifteen (15) business days. If the issue cannot be resolved by the Certification Director, he will refer the appeal to the Certification Council. The appeal will also be referred to the Council if the candidate does not accept a determination by the Certification Director. The Council will review the appeal within thirty (30) days and will make a determination within sixty (60) days. The decision of the Council is final.

Fees

Fees are subject to change. As of January 2019,

Application and submission fees are $997 or 6 payments of $185.

Re-testing fees are $99 per module for each retake.

Annual renewal is $99/year

Continuing education costs: variable

Certificate Completion

Once all the requirements have been submitted, graded and passed, you will receive an email confirming you have fulfilled all of the requirements and are able to use the designation of Certified Professional Financial Coach and all of the privileges associated with it. You will receive a certificate in the mail and digital copies of the designation logo for use on marketing materials.

Continuing education

You will be required to submit 12 continuing education hours every 12 months to maintain certification as well as pay the annual recertification fee of $99.

If you have ANY questions or concerns, have difficulty accessing the materials or wonder if you're missing anything, don't be a stranger! We are here to help you!

Once you have read these requirements, we invite you to enroll in the Certified Professional Financial Coach process and separate yourself in the industry.

Frequently Asked Questions

Who is the Certified Professional Financial Coach™ for?

The Certified Professional Financial Coach™ designation is for those financial coaches who want to hold themselves to the highest standards and provide the best possible services for their clients. A Certified Professional Financial Coach™does not just help friends and family members nor do they only provide financial coaching as a ministry service.

They want to hold themselves and their financial coaching business to the highest standards of professionalism in the industry by being experts in the three pillars of financial coaching: business acumen, financial skills and coaching skills. Financial coaching is more than a passion to a Certified Professional Financial Coach™. They want financial coaching to be their career and want their financial coaching message to have massive reach!

How do I get certified?

First you will need to be enrolled or have completed either the Live or Self-paced versions of Financial Coach Academy. You then can pay the application fee and begin to complete the certification requirements. You have 12 months from the date of application to complete all of the requirements.

What are the requirements?

Requirements for eligibility have been developed to ensure that the application process is fair for all applicants. Each requirement has been established to ensure that individuals certified as Certified Professional Financial Coaches have a superb level of knowledge and proficiency necessary to provide financial coaching services. To earn the Certified Professional Financial Coach™ designation, all candidates must:

Enrollment Dues and Application:

- Pay the registration fee
- Complete the application form

Educational Requirement:

- Complete the Financial Coach Academy Self-Paced or Live Financial Coach Academy course. You can apply for certification after you have completed the course or in conjunction as you complete the course. Once you apply for certification, you have 12 months to submit your application and complete all requirements, including the course itself.

Experience Requirement:

- Answer, submit and pass the Short essay questions
- Submit and pass the required supplemental business forms
- Submit and pass review of 2 client case studies
- Submit three (3) testimonials from previous clients using the supplied form
- Submit and pass proof of coaching 10 clients (minimum of 6 paying clients)
- Pass the multiple choice examination
- Submit and pass your "Why" Video

Continuing Education:

- Complete Annual continuing education requirements

The requirements above can be met before or during your application window (12 months from date of applying). Certification will not be granted until all requirements have been completed successfully.

Final Certification:

- Adhere to the Certified Professional Financial Coach™ Code of Ethics
- Annual renewal along with proof of Continuing Education requirements and the $99 renewal fee

How much does it cost?

Fees are subject to change. As of January 2019, application and submission fees are $997 or 6 payments of $185. Re-testing fees are $99 per module for each retake. Annual renewal is $99/year

Continuing education costs: variable

How is the Certified Professional Financial Coach™ designation different from other financial coaching certifications?

The Professional Financial Coach certification program focus on business skills in conjunction with coaching skills and financial knowledge, unlike other certification programs which only focus on financial concepts and some coaching.

It focuses on empowering those that are coaches as opposed to counselors and advisors.

Certified Professional Financial Coaches™ must demonstrate proven experience, skills and business strategies that other financial coaching certifications don't require. This ensures that only the highest quality of financial coaches can have the designation of Certified Professional Financial Coach™

A Certified Professional Financial Coach™ agrees to professional and ethical ideals and accept and uphold higher standards of responsibilities to their clients.

What other benefits are there to becoming certified?

During the application process you will have access to a secret Facebook group for candidates and current coaches to help support you as you make your way through the certification process as well as monthly mastermind calls with our amazing staff to help answer your questions and support you.

Once certified you will also have increased confidence, notoriety, credibility and expertise than other financial coaches because of the strict requirements of the Certified Professional Financial Coach™ application process, continuing education requirements and code of ethics.

You will also receive a professional certificate for public display, the Certified Professional Financial Coach™ logo for use in your marketing material and the credibility and notoriety of the Certified Professional Financial Coach™ designation.

What happens when you submit and complete a module?

You will receive a confirmation email that we have received your material. Please allow up to 2 weeks for grading per module. Once your material has been graded you will receive a score sheet and be notified if you have passed or failed that module.

What happens if you fail a module?

You will get one free retake per module except for the multiple choice examination which will incur a $99 retake fee. Subsequent retakes will also incur a $99 retake fee.

What happens once you are certified?

Once all of your requirements have been submitted, graded and passed you will receive an email confirming that you have fulfilled all of the requirements and are able to use the designation of Certified Professional Financial Coach and all of the privileges associated with it. You will receive an official certificate in the mail and digital copies of the designation logo for use on marketing material.

What are the requirements once you are certified?

You will be required to maintain 12 hours of continuing education per 12 months from the date of certification.

You will also be required to pay an annual recertification fee of $99 to maintain your certification.

Contact Us

- Ask a question in the Facebook group
- Ask a question in the monthly mastermind video call https://zoom.us/j/3710920732
- Schedule a phone call with Michael using this link
- Email Michael at info@Certified ProfessionalFinancialCoach.com.