



Building Native Communities Financial Coaching for Families

November 29 & 30, 2022
8:30am-5:00pm

Training Goals:

During our two days of financial coach training, we will support participants to:

- Understand the foundational principles of coaching as well as how and when it can be used to support client's forward movement along the financial stability continuum
- Embrace a coaching presence that encompasses curiosity, compassion, and intuition
- Develop core coaching skills such as the four levels of listening, asking empowering questions, identifying core values, self-management, visioning, and goal setting
- Explore financial coaching related tools that will support clients
- Practice coaching their peers to build and strengthen their coaching skills

Agenda: Building Native Communities: Financial Coaching for Families

DAY 1
Tuesday
November 29
Training Time:
8:30 am-5:00 pm

- ◆ 8:00 – 8:30 am – Breakfast (provided)
- ◆ 8:30-10:30 am – Introductions; Session Logistics; Setting the Stage; Framing; What is Coaching?; Coaching Model
- ◆ 10:30-10:45 am – Break
- ◆ 10:45-12:00 pm – Grounding; Connecting
- ◆ 12:00-1:00 pm –Lunch (provided)
- ◆ 1:00-3:00 pm – Listening; Empowering Questions
- ◆ 3:15- 3:30 pm - Break
- ◆ 3:30-4:30 pm – Demo; Values and Alignment
- ◆ 4:30- 5:00 pm – Wrap-up & Closing



Agenda: Building Native Communities: Financial Coaching for Families

DAY 2
Wednesday
November 30
Training Time:
8:30 am-5:00 pm

- ◆ 8:00 – 8:30 am – Breakfast (provided)
- ◆ 8:30-10:15 am – Opening Reflections from Day 1; Setting the Stage for Day 2; Empowering Questions (Continued); Boundaries
- ◆ 10:15-10:30 am – Break
- ◆ 10:30-12:00 pm – Self-Management; Intuition
- ◆ 12:00-1:00 pm –Lunch (Provided)
- ◆ 1:00-3:15 pm –Additional Tools; Setting Goals; Additional Core Skills
- ◆ 3:15- 3:30 pm – Break
- ◆ 3:30-4:45 pm –Session Flow; Applying the Coaching Skills
- ◆ 4:45-5:00 pm –Affirmation Activity