Financial Coaching: Building a Future in Wisconsin
An Introductory Workshop
September 10, 2010
Madison Wisconsin
The Pyle Center
9:30 am-3:30 pm

Sponsored by the Center for Financial Security, UW-Madison, UW Cooperative Extension, and American Family Insurance

This one day workshop will bring national experts on financial coaching to Wisconsin to seed future coach training sessions and expand models in the state.

The event will provide an overview of financial coaching, models of delivering coaching, evaluation tools and an introductory train-the-trainer session. Registration costs: $30 (Includes lunch and all workshop materials)

AGENDA
9:30  Welcome & Introduction
      J. Michael Collins, Center for Financial Security, UW Madison
10:00 Coaching Models: A National Overview
      Karen Murrell, Higher Heights Consulting & Annie E Casey Foundation
      Financial Coaching Provider
10:45 Starting a Coaching Program: Panel Discussion
      Deb Neubauer, Dane County Financial Education Center
      Kristen Bruder, Dunn County Cooperative Extension
      Nan Cnare, United Way of Dane County
12:00 Lunch at Pyle Center
12:45 Coach and Partner Experiences: Panel
      Rob McCalla, CFP, Lecturer Personal Finance UW Madison
      Kayla Nikula, Student Coach
      Susan Gafner, Financial Education Center
      Lisa Andrews, Financial Education Center
      Peggy Olive, Richland County Cooperative Extension
2:00  Does it Work? Measuring Outcomes of Coaching
      J. Michael Collins, Center for Financial Security, UW Madison
2:30  Learning to be a Financial Coach
      Karen Murrell, Higher Heights Consulting
      Peggy Olive, Richland County Cooperative Extension
      Joan Sprain, St Croix County Cooperative Extension
3:15  Conclusion