



# CNM Financial Coach Certification Course

For over ten years, The Central New Mexico Community College, CNM Ingenuity, Inc., Financial Coach Certification Course has been recognized as a national leader in preparing participants to implement financial coaching, academic coaching and career coaching programs in their classrooms, social service organizations, and communities. Our dynamic model of highly interactive coach training teaches fundamental coaching through a financial context by engaging participants in the core competencies areas: Coaching Skills, Basic Financial Knowledge and Cultural Awareness and Humility.

CNMI's nationally renowned training team consists of one certified coach and one financial educator with expertise in adult learning theory and experiential learning, as well as coaching experience in student services in higher education, non-profit organizations serving low-income populations and private industry.

## Who Should Attend:

Everyone who wants to learn how to implement coaching strategies into their daily work life, in particular, professionals who serve clients and students from underrepresented populations and those experiencing poverty. Sample titles of participants include:

- K-12, University, or Community College Educators and Administrators
- Nonprofit Organization Professionals
- Workforce Development Educators
- Learning & Development Officers
- Small Business & Economic Development Educators
- Philanthropic Organization Professionals



## Why You Should Attend:

CNMI Coach Training Programs are experiential, problem-based learning programs designed to inspire and engage participants in the fundamental aspects of coaching that can be implemented to advance student success, assist people seeking to improve their financial situations, and develop your workforce. This training will allow you to develop a deeper understanding of the coaching philosophy, methodology, and tools while developing your own coaching skills.

The intention of the course is to prepare participants to easily integrate coaching skills, strategies, documents, and tools into their daily work. The coach training incorporates research of behavioral knowledge of low income client populations. The learning outcomes prepare trainees to coach in any context. Upon successful completion of the training, participants will receive an CNMI Training Certificate qualifying them to apply to four different certification pathways including:

- CNMI: CNM Certified Coach (launching late 2018)
- Center for Credentialing and Education: Board Certified Coach
- International Coach Federation: Associate Certified Coach-Portfolio Path
- International Association of Coaching: Masteries Practitioner.





## What You'll Learn:

- Understand the COACH model
- Explore the Coaching Philosophy that all people are naturally creative, resourceful and whole.
- Learn how to integrate coaching into your daily work responsibilities and tasks.
- Engage in the coaching process
- Understand the connection between beliefs, emotions and financial behaviors
- Acquire skills in personal financial management and how to help others.
- Explore cultural awareness and humility
- Practice multiple tools to engage clients, to facilitate financial topics, to encourage goal setting, and encourage positive behavior change
- Create an implementation and action plan to incorporate the coaching philosophy
- Core Competencies Overview:
  - **Coaching: Adapted from the International Coach Federation**
    - Setting the Foundation
      - Ethics and Professional Standards
        - Clearly Communicate the difference between coaching, consulting, psychotherapy and other support professions
      - Establishing the Coaching Agreement
    - Co-Creating the Relationship
      - Establishing Trust
        - Create a safe, supportive environment of mutual respect and trust
      - Coaching Presence and Philosophy-NCRW



- Communicating Effectively
    - Active Listening
      - Attends to the client and the client's agenda
      - Hears the client's concerns, goals, values and beliefs about what is and what is not possible
    - Powerful Questioning
      - Asks questions that evoke discovery, insight, commitment and/or action
  - Facilitating Learning and Results
    - Creating Awareness
      - Helps the client to discover for themselves the thoughts, beliefs, perceptions, emotions, etc. that strengthen their ability to take action and achieve what is important for them.
    - Designing Actions
      - Helps the client to explore ideas and solutions, to evaluate options, identify opportunities that are central to goals.
- **Financial Skills: Adapted from National Endowment for Financial Education**
- Professionalism and Ethics
    - Clearly communicate the difference between financial coaching, advising, counseling, planning and other financial professions.
    - Do not provide financial advice. Provide referrals.
  - Cash Flow Management
    - Understand how to track and manage stable and/or volatile income
    - Creative income generation
    - Tools for managing income
  - Credit and Debt Management
    - Learn strategies for debt alleviation
    - Costs of credit
    - Credit score calculation



- Credit repair approaches
  - Types of consumer loans
  - General knowledge of bankruptcy
  - Credit counseling
  - Savings and Goal Setting
    - Planning for major purchases
    - Alternatives to conventional banking
  - Financial Services
    - Transactional safe accounts
    - Predatory lending
- **Cultural Awareness: Adapted from the National Association of Social Workers**
- Realize that a person's perceptions are influenced by one's own world view and biases may exist at conscious and unconscious levels
  - Respond respectfully to all people
  - Recognize that strengths exist in all people
  - Seek understanding about how oppression and systems of privilege affect opportunities for people of differing cultures
  - Recognize the disparities that have influenced practices of and for the historically oppressed, underrepresented and underserved populations.
  - Integrate cultural competence into specific attitudes, standards of behaviors, policies, practices and service delivery models.



## What you'll get:

Training materials include:

- Consumable CNMI Certified Coach Training Manual
- Co-Active Coaching: Changing Business, Transforming Lives by Henry Kimsey-House, Karen Kimsey-House and Phillip Sandahl
- Guide to Surviving Debt: National Consumer Law Center
- Upon successful completion of the certification, participants will receive digital access to supplemental resources.

## Training Schedule: Total 60 hours

Session 1

Day 1 -8:00 am to 5:00 pm

Day 2- 8:00 am to 5:00 pm

Day 3- 8:00 am to 1:00 pm

Intercession 4 to 5 weeks: 20 hours of individual fieldwork and coaching practice at their workplace.

Session 2: The following month

Day 4- 8:00 am to 5:00 pm

Day 5- 8:00 am to 5:00 pm

Day 6- 8:00 am to 1:00 pm

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### **Organizational Training Price** Available for up to 30 trainees

The training fee includes

- Tuition
- 1 workbook per student
- 2 textbooks per student
- training materials and supplies
- morning refreshments and full lunch

**Individual Training Price:** \$699.00 USD

Lodging and transportation are not included.

[www.coachingpaths.org](http://www.coachingpaths.org)  
[coaching@cnm.edu](mailto:coaching@cnm.edu)



## What past participants say:

Alfonso Bovell, Coach  
Tulsa, OK

*This training was amazing! I knew I was going to learn something. I didn't know that in just one day, I would completely shift my perspective towards the clients I serve.*

Vanessa Benitez, Case Manager  
New Economics for Women, Los Angeles, CA

*I have been to countless trainings, all with great information. However; this is honestly the most helpful, life-changing, and easy to implement training I have ever received. It is amazing how the ideas and topics that I have learned before are so much more eye-opening and memorable from this training. Thank you so much!*

Niki McKay, Director of College Engagement  
Amy Biehl High School, Albuquerque, NM

*This experience has completely changed the way I see the process of helping students see themselves as college bound and successful. The holistic approach has transformed the way I plan to work with students. I am leaving this training with renewed hope, a sense of clarity, and a full array of resources. Thank you!*

Claudia Cruz, Family Advancement Coordinator  
Community Action Program, Tulsa, OK

*Impactful, relevant, clear, interesting...this coaching training has been the highlight of my year. Thank you for giving us your best.*

Jay Ramsey, Workforce Advocate  
Dallas, TX

*The curriculum flowed well. I loved how you mixed it up and kept it lively. I think all case management, staff and directors NEED this training.*

Lisbeth Persad, Family Case Manager  
Avenue CDC, Houston, TX

*This training was wonderful! My team and I have changed how we implement our services and embrace that our clients are creative, resourceful and whole. We have also embraced using skills in our personal lives and are excited to have new tools to help clients reach their goals. Thank you for your energy and challenging/stretching us to achieve more!*

Amanda Forkasdi Millea, Assistant Principal  
East Mountain High School, Albuquerque, NM

*The College Coaching training was one of the best professional development experiences of my career! I value all of the new tools and strategies I can now use with students to enhance my work and their learning.*

Demeka Mozley, Financial Coach Coordinator  
Points of Light Foundation, Atlanta, GA

*The trainer did an amazing job being prepared and managing time. I really enjoyed how you they were able to modify the learning process according to the needs of the trainees.*

Lisa Sweeney, Career Coach and Trainer



CFT, Dallas, TX

*You are creating so much good in this world! You have the power to unlock heart strings and play a universal harmony of self-actualization. WOW! I am forever grateful.*

Charles Williams, Financial Coaching Fellow  
Baltimore CASH, Baltimore, MD

*I really enjoyed this training. I found myself consistently surprised at how much I was learning and how useful the core skills are, both with clients and in my everyday life.*

Ellen Crawford,  
Sierra Association of Foster Families Reno, NV

*"This was the most meaningful professional development course I have ever taken. I hope to find future opportunities for financial coach training that, like this one, are great learning experiences"*

Jennifah Chard, Program Specific Counseling Services,  
Cabrillo College, Aptos, CA

*"There is a strong connection between life and finance. It is now clear to me. The concepts and information shared will benefit me both at work and in life."*

Tonja Murphy,  
The Prosperity Center of Greater Jackson Atlanta, GA

*"The Financial Coach training is one of the best trainings I've attended. The facilitators provided resources and real-life scenarios that are beneficial to use in any area of coaching."*

Ryan Miller, Family Self-Sufficiency Manager  
Garrett County Community Action Committee

*"The overall course made me aware of an area of my life that I need to become more focused on, and less fearful of (or perhaps, just move through anyway). I am working on my own "financial house," and will be much more sympathetic and understanding of clients. The process of change can be long and hard-and scary-but often worth it."*

Jillian Kelly  
Garrett County Community Action Committee

*"I found this training to be very valuable. The exercise with working on coaching a partner definitely gave me more confidence to be able to coach my clients during my everyday work day. It also helped me to better understand the different coaching styles and to make sure to go through the entire coaching model when working with a client and not to rush right to solving problems. I learned a lot from my fellow classmates, especially the ones that have been practicing and implementing the coaching model a lot longer than I have."*