

Certified Financial Counselor School Part I: The Financial Counseling Process

December 6 – 10, 2009 • St. Pete Beach Florida

Sunday 12/6/09	Monday 12/7/09	Tuesday 12/8/09	Wednesday 12/9/09	Thursday 12/10/09
Hotel check in after 3:00 p.m. 1:30-2:00 p.m. <i>Registration</i> 2:00-4:00 p.m. Designing & Implementing a Financial Counseling Program <i>Chuck Pulvino</i> 4:00-4:30 p.m. Study Time <i>Optional</i> 4:30 p.m. Testing <i>Optional</i> 5:00-6:00 p.m. Networking Hour	7:45-11:30 a.m. Communication Process for a Financial Counselor <i>Chuck Pulvino</i>	8:00-10:15 a.m. Financial Counseling Overview & the Role of the Financial Counselor <i>Kathryn Greiner</i> 10:15-11:30 a.m. Spending Plans <i>Kathryn Greiner</i>	8:00-11:00 a.m. Creditor & Consumer Rights & Remedies <i>Ken King</i> 11:00-11:30 a.m. Study Time <i>Optional</i>	8:00-11:30 a.m. Understanding Your Member's Financial Issues <i>Ken King</i>
	11:30 a.m.-12:30 p.m. <i>Networking Lunch Provided</i>	11:30 a.m.-1:00 p.m. <i>Lunch on Your Own</i>		
	12:30-4:00 p.m. Communication Process for a Financial Counselor <i>(continued)</i> 4:00-4:30 p.m. Study Time <i>Optional</i> 4:30 p.m. Testing <i>Optional</i>	1:00-2:15 p.m. Understanding & Improving Creditworthiness <i>Kathryn Greiner</i> 2:15-4:00 p.m. Helping Members Work with Creditors <i>Kathryn Greiner</i> 4:00 – 4:30 p.m. Study Time <i>Optional</i> 4:30 p.m. Testing <i>Optional</i>	1:00-2:30 p.m. Public Agencies & Community Resources <i>Kathryn Greiner</i> 2:45-3:15 p.m. Problem Prevention, Education & Information Programs <i>Kathryn Greiner</i> 3:15-3:45 p.m. Study Time <i>Optional</i> 3:45 p.m. Testing <i>Optional</i>	1:00-4:30 p.m. Investigating Financial Solutions & Options <i>Ken King</i> 4:30-5:00 p.m. Study Time <i>Optional</i> 5:00 p.m. Testing <i>Optional</i> <i>Have a safe trip home!</i>
Evenings Free				

Schedule is subject to change

Revised 10/8/08

For more information about the program, e-mail training@cuna.coop or call 800-356-9655, ext. 4249.

To register, visit training.cuna.org and select *Schools & Conferences*.

