



NWI online certificate course now available! Financial Wellness Facilitator Certificate Course

Powered by the Foundation for Financial Wellness

This National Wellness Institute (NWI) Facilitator Certificate course, offered in collaboration with the Foundation for Financial Wellness (FFW), looks at financial wellness through the lens of NWI's Six Dimensions of Wellness and aligns with the NWI Wellness Promotion Competency model.

Facilitator Certificate course participants can use the training, slides, and handouts provided in this self-paced eLearning course to lead a **55-minute "Living Financially Well" Lunch and Learn** to enhance the financial wellness of the populations they serve.

Individuals who successfully complete the course will earn a certificate as a Financial Wellness Facilitator and up to **7* continuing education credits** (see back).

Enhance your financial wellness toolkit with this self-paced online training!

Financial Wellness Facilitator Certificate courses are offered bi-monthly, beginning on the third Monday of the month (February, April, June, August, October, December). Participants must complete all elements during the 6-week course for which they are enrolled, and may do so at their own pace.

Registration Rates

Current NWI Members: \$545 | Non-Members: \$675

Not an NWI Member? Visit NationalWellness.org/Join for more information



Who's attending?

- Wellness coaches and coordinators
- Worksite wellness & EAP professionals
- Health educators
- Human resource & employee benefits professionals
- Wellness brokers
- Motivational speakers
- Teachers/Instructors
- C-suite leaders
- Anyone wishing to offer training in financial wellness

This course is offered through an NWI Education Partnership



National
Wellness
Institute



Foundation for
FINANCIAL WELLNESS

Register online at NationalWellness.org/FinancialWellness



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Course Overview

Individuals who complete the Financial Wellness Facilitator course will earn a certificate as a Financial Wellness Facilitator. Certificate holders can facilitate a high-impact motivational financial wellness educational experience at employer worksites or community centers.

The Financial Wellness Facilitator Certificate course includes the following self-paced interactive eLearning modules. Participants must complete each module and its associated quiz before receiving access to the next module.

- 1) "The Case for Financial Wellness" (2 hours)
- 2) "The 5 Essentials for Financial Wellness" (3 hours) — 1) Budgeting, 2) Investing, 3) Risk & Insurance, 4) Taxes, 5) Life & Legacy
- 3) "Living Financially Well" Lunch and Learn Facilitator Training (2 hours)

Facilitator Certificate course registration includes the PowerPoint slide deck, facilitator notes, handouts, and additional tools to aid in presenting the "Living Financially Well" Lunch and Learn.

Objectives

Certificate course participants — as well as the individuals they train — will be able to:

- Connect their experience around their personal financial wellness to the National Wellness Institute's (NWI's) Six Dimensions of Wellness Model, and the Multicultural Wellness Wheel.
- Determine how financial wellness impacts all aspects of the Six Dimensions of Wellness Model (including all areas of a person's work and home life).
- Recall the names of the 5 Essentials for Financial Wellness.
- Identify thoughts that prevent individual financial wellness and evaluate methods to create a plan to change those thought barriers.
- Identify strategies to prepare and stick to a budget and eliminate debt.
- Create a plan to develop an emergency cash reserve of 3-6 months.
- Understand how an approach to investing can be aligned with their life vision, values, and goals.
- Examine and mitigate the biggest financial risks most individuals face.
- Identify how to reduce taxes now and in retirement.
- Discuss essential tools that help to build a life and legacy that aligns with their most important values.
- Recognize the Foundation for Financial Wellness (including its educators, facilitators and counselors) as a non-solicitous, financial wellness organization.

Continuing Education Credit (CEC) for Financial Wellness Trainings

Participants can earn up to 7 CECs toward certifications they currently hold.* A CEC certificate will be e-mailed to individuals who select their desired CEC certificate(s) when completing the post-training evaluation form. The Financial Wellness Facilitator Certificate course is pre-approved by the following organizations:



ACSM: The American College of Sports Medicine's Professional Education Committee certifies that "National Wellness Institute" meets the criteria for official ACSM Approved Provider status from (December 2018 – December 2021). Approved Providers and their content reflect the concepts of their respective organizations and do not necessarily represent the positions or policies of ACSM. Providership # 661228



NWI (CWP): Continuing education credits for NWI's Financial Wellness Facilitator Certificate course have been approved by the National Wellness Institute for NWI Certified Wellness Practitioners (CWP).



SHRM: National Wellness Institute is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM. The Financial Wellness Facilitator Certificate course is valid for 7* PDCs for the SHRM-CPSM or SHRM-SCPSM. For more information about certification or recertification, please visit shrmcertification.org.



HRCI®: The use of this seal confirms that this activity has met HR Certification Institute's® (HRCI®) criteria for recertification credit pre-approval.

General Attendance Continuing Education Certificate: National Wellness Institute-verified contact hours for continuing education credit/certificate of participation.

*Participants will receive 2 credits for completion of "The Case for Financial Wellness" course (taken either a la carte or as part of the Facilitator Certificate course) and 5 additional credits for the completion of the full Financial Wellness Facilitator Certificate course.