Certificate in Behavioural Money Coaching – Training Overview

Behavioural Money Coaching:
An Integrative, Holistic Approach to Client Management

Behavioural Money Coaching is a new field and paradigm. It is the bridge between two worlds, the financial services industry and the field of coaching psychology. During this training, we will provide an in-depth understanding of Behavioural Money Coaching including the benefits and advantages it provides to advisors, planners, and their clients. People often fail to fulfill their financial plans and/or sabotage their investment strategies due to secondary issues and emotions that impair their ability to sustain their desired outcomes. The Behavioural Money Coaching model developed by the Money Coaching Institute is an innovative approach that assists the client (and their advisors) in identifying, changing and managing their personal, emotional and financial behaviors and triggers. This model effectively allows the advisor and the client to work together to form a deeper understanding of the client's patterns and behaviors which often derail the client's ability to achieve their financial goals. With the guidance and support of a good advisor/coach the client is far more likely to move beyond limiting patterns and beliefs and better fulfill their financial potential.

Money Coaching: A New Paradigm and Helpful Ally to Advisors

Through a step-by-step Money Coaching process, you will learn key lessons that will help you assist clients to develop new levels of awareness from which positive financial changes can occur.

Managing Client Emotions in Difficult Times

During the training you will also learn to understand the psychological and emotional aspects of fear and how it affects client's financial choices. Unmanaged financial fear can greatly impact your client's decisions and behaviors. In the training, you will learn how to proactively address and manage your client's fears and behaviors effectively, especially during volatile markets. Specific tips and strategies for managing client's fears and behaviors will be provided as well as methods for engaging clients into action. By integrating this knowledge, you will also learn to anticipate your client's behaviors and reactions, which can help you to build greater trust and rapport.

What this course will cover:

- **Behavioural Money Coaching – An integrative, holistic approach to helping clients create a healthy and empowered relationship with money.**
- **The Mind and Money: Neuroeconomics and Behavioural Finance 101**
- **Historical Exploration and Discovery**
- **Understanding Inherited Family Patterns**
- **Understanding and Working with the Eight Money Types**
- **Red Flags/Indicators**
- **Powerful Money Coaching Questions & Frameworks for Inquiry**
- **Identifying underlying Money Patterns and Behaviors**
- **Determining the "Core" Money issues**
- **Strategies for working with "challenging" Money Types**
- **Developing a Plan & Strategy for Change – Designing an on-going coaching program to support the client in making positive changes, practically and behaviourally**
- **Life Mission, Vision and Purpose Guidance - Help your clients to become aligned with their underlying vision, values and beliefs.**

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