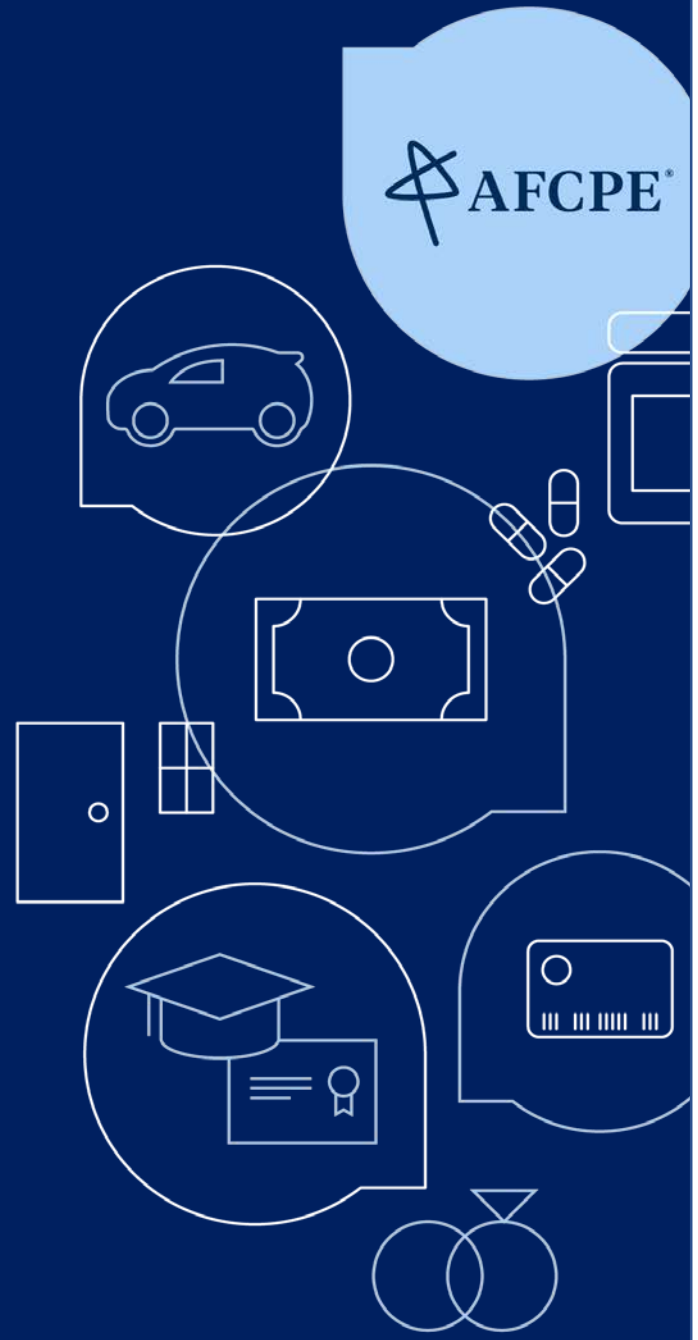
2020 AFCPE Membership Benefits



AFCPE®

Association for Financial Counseling & Planning Education

Rachael DeLeon
Director of Communication and Member Services

Thank you for your interest in AFCPE Membership!

Welcome!

Whether you are exploring AFCPE Membership for the first time or are a long-time member seeking out new resources and benefits to support your career, we're excited that you're here!

AFCPE membership brings together diverse and inclusive professionals from financial education, research, and practice. It provides you with a strong network of knowledge, cutting-edge research, professional development opportunities, as well as tools, resources, and discounts that help impact your work and advance your career!

When you become an AFCPE member, you join a rich history. A bright future. A strong community. A family. A movement. At AFCPE we meet you where you are – by listening, guiding, supporting, and connecting!

Read on to learn about all the benefits of AFCPE Membership. We look forward to supporting you in 2020!

SETTING THE STANDARD,

Rachael DeLeon
AFCPE®

What is AFCPE Membership?

AFCPE Membership *is a diverse and inclusive network of professionals who share a common vision for personal finance in our country and our communities.*

Whether you are new to the personal finance field or have been working in financial education, research, or practice for many years, the AFCPE community has a place for you.

Membership offers a wide variety of benefits – opportunities, discounts, and resources – to support your work, advance your career, and expand your impact.

Learn more about membership directly from our members!

Pillars of Benefits

A Diverse & Inclusive Professional Network

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- Monthly Virtual Meet-Ups – p. 9
- Task Force Involvement – p. 10

Research & Information

- Journal of Financial Counseling and Planning p. 12
- The Standard Quarterly Newsletter p. 13
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- Bridging Research & Practice – p. 15

Recognition & Grant Funding

- Awards Recognition – p. 17
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Professional Development & Career Growth

- *Mentor*Connect Program p. 22
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- Tools & resources from esteemed partners p. 28 – 30
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- AFCPE Symposium – p. 32

AFCPE Membership Options & Pricing

Professional

For the individual professional.

$150 annually

Certification Candidate

For those enrolled in an AFCPE certification program.

$100 annually

University Student

For students studying full time at the undergraduate or graduate level. Full-time status is defined by your current college or university. Unofficial transcripts required.

$35 annually

Emeritus

For AFCPE members at full retirement age (as defined by the SSA) and in good standing for 10 or more years.

$100 annually

Contact AFCPE directly.

Please note: *AFCPE membership runs on a calendar year (January 1-December 31) but brings value to your work and your career no matter when you join! Membership dues are not pro-rated, as many of the benefits are available on demand through the membership dashboard.*

AFCPE® MEMBER

A Diverse & Inclusive Professional Network

AFCPE Member Search Tool

Keeping You Connected!

As an AFCPE Member, your membership dashboard contains a member search tool. This resource helps to connect you with a wide range of professionals across research, education and practice.

Find and connect with AFCPE members to exchange ideas, support local initiatives, or expand your professional network.

Make new connections in your geographic area or across your professional area of interest.

The Member Search is located in your myAFCPE Membership Dashboard.

Free for members!

Interactive Message Boards

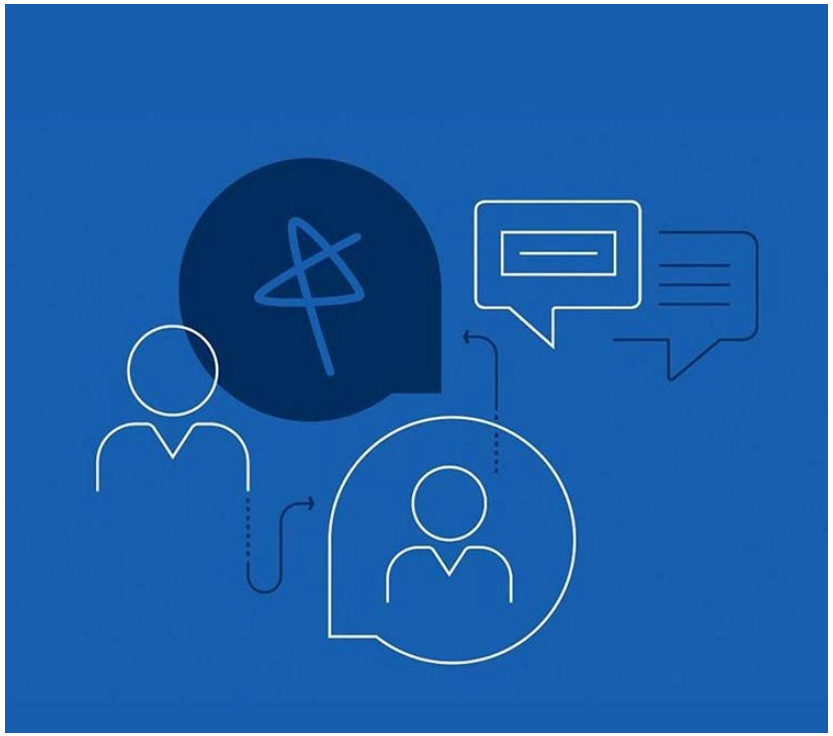
Join an Active and Growing Community!

Exclusive Facebook Group

Connect with AFCPE members from across the country - ask questions, exchange ideas, share resources, and get to know others within the AFCPE community!

Not on Facebook?

Our **Interactive Message Board** is a space within your myAFCPE dashboard to connect with other members of the AFCPE community – to share ideas, information, referrals, and resources on topics that are important to you and your work.



Monthly Virtual Meet-Ups

For Members, By Members.

Each month, AFCPE members meet up virtually to learn and share new ideas.

Meet-ups allow you to expand your knowledge while engaging with other AFCPE members from across the country.

Meet-ups are member led, with topics selected by members, for members!

Free for members!

AFCPE Task Force Involvement

AFCPE Membership provides you with a platform to help advance the field and create lasting impact. There are more than a dozen task forces with opportunities for leadership and involvement. We invite you to take a look at the list below and become more involved with the organization.

- Awards Task Force
- Career Task Force
- Certification Council
- Diversity and Inclusion Task Force
- Finance Task Force
- Government Relations Task Force
- Investment Task Force
- Member Services Task Force
- Newsletter Task Force
- Nomination Task Force
- Research to Practice Task Force
- Symposium Task Force

A great way to influence the field and build your resume!

Research & Information

Journal of Financial Counseling & Planning

The Journal of Financial Counseling and Planning (JFCP) connects financial professionals to important scholarly research related to the financial decision making of individuals and families. The JFCP provides evidence-based ideas and information that enhance the skills of financial professionals to impact the financial well-being of individuals and families worldwide positively.

AFCPE Certified Professionals: Earn CEUs!
We offer a new, and improved, JFCP quiz with each journal!
This is fun way to connect with the research happening in our field and apply it to your work!

Free for members! A $140 savings on annual subscription!

The Standard – AFCPE's Newsletter

The Standard is an online newsletter filled with cutting-edge articles around the latest money topics discussed in our field!

AFCPE Members receive online access to both current *and* past articles of *The Standard* quarterly newsletter. As a member, you can also serve on the newsletter task force.

Association for FINANCIAL COUNSELING & PLANNING EDUCATION

the Standard

4th QUARTER 2015 | VOL. 33 #3

3 Change Lives with Powerful Stories

4 Buddy Swallowed a Sock

6 **Research & Training Symposium:** How to Create a Prosperous Private Practice

7 **Research & Training Symposium:** Three Reasons Why People Don't Use Banks

8 **Research & Training Symposium:** Getting to the Core of America's Struggles with Financial Health

10 **Research & Training Symposium:** Schedule of Events

13 **Book Review:** *Money Master the Game: 7 Simple Steps to Financial Freedom*

14 Executive Director Notes

AFCPE

Five Years Later–Is Financial Education Working?

By Dean Obenauer, MPA, AFC®

Since the financial crisis of 2008, there has been a marked increase in financial education efforts at all levels, including K–12 education, college, employment, and in communities, which is all good. Up to that time, there was a lot of discussion about the need for financial education, but the financial crisis brought to the forefront that we need to do more than just talk about it. In a nutshell, the intent of financial education is to increase knowledge, build skills and change behaviors so that people can make good financial decisions for themselves and their households. There are mixed opinions as to the effectiveness of these education efforts which begs the question "Is financial education working?"

From my perspective at Creighton University, the answer is a resounding "Yes!"

There is no one best approach or one size fits all, but realize that it is so important to just do something…

Am I reaching every student? No. Am I reaching more students than we used to? Yes. Can we do more? Yes.

You may recall an article I wrote for *The Standard* way back in the 3rd quarter of 2011, where I described Creighton University's approach to developing a financial literacy program. As a result of the financial crisis, a financial literacy position was created in the Financial Aid Office in 2010 primarily because the University believed financial education to be a value-added service that could benefit our students. Although a financial education program can be housed in a variety of student service offices, we believed the Financial Aid Office was a good place to start with a marketing effort to educate and inform the

Continued on page 12

[View issues of the Standard here!]

Historical newsletters: Free for members!

Membership Monthly Minute

Keeping You Informed!

Each month, you'll receive a monthly e-blast from AFCPE's Executive Director.

This email is full of useful information on what's happening in the organization, in the field, and among fellow AFCPE members.

The e-blast is a great opportunity to highlight the work you are doing and to share it with professionals across the field!

Free for members!

Bridging Research & Practice

An AFCPE Unique

AFCPE believes in education and practice that is rooted in research. We are proud of our academic roots and our ongoing commitment to bridging gaps to ensure lasting financial behavior change.

Our network is diverse and inclusive – with professionals working across the full continuum of financial care. The bridge between research and practice is woven into our collective impact – for our professionals, our clients, and our communities.

"There is no such thing as an effective one-size-fits-all approach to financial education, but we do have the capacity to scrutinize our current work, upgrade our efforts, and remove barriers between practitioner and researcher."

Billy Hensley, NEFE President & CEO

AFCPE® Member

A benefit that we see as priceless…

National Recognition & Grant Funding

Awards Recognition

AFCPE Member Awards

Members are invited annually to apply for one of our member awards. This is an excellent opportunity to bring awareness and recognition to your work, your program, or your organization.

Award winners are recognized through a national press release, honored at the Annual Symposium, and receive an awards seal to continue to bring recognition to their accomplishments.

- Distinguished Fellow Award
- AFCPE "Setting the Standard" Award
- Mary Ellen Edmondson Educator of the Year Award
- Financial Counselor of the Year Award
- Outstanding Consumer Financial Information Award
- Outstanding Educational Program Award
- Outstanding Financial Counseling or Planning Center Award
- Outstanding Research Journal Article of the Year Award

Meet Current and Past Award Winners!

Open to all AFCPE Members. Many awards include a monetary prize.

Mary O'Neill Grant Funding

$2,500 Annual Mini Grant

The Mary O'Neill Mini Grant is an annual grant opportunity open to all AFCPE Members. The funds are provided for the development and implementation of an innovative, high-impact financial education project.

Dr. Barbara O'Neill, an AFCPE member and Past President of AFCPE, has made a generous restricted donation in honor of her late mother, **Mary O'Neill,** a financially capable woman.

All AFCPE Members are eligible to apply!

Meet Current and Past Mini Grant Recipients!

Media Opportunities

Sign up to be a media resource!

Strengthen your professional brand and gain name recognition within the personal finance field!

When AFCPE receives a media call, we reach out to our AFCPE members and certified professionals to share your expertise.

We work with a local PR team to continue to raise awareness for the certification mark and the good work of the AFCPE community!

AFCPE® Members have been quoted in:

Forbes
TODAY
nerdwallet
The New York Times
INVESTOPEDIA
USA TODAY
BUSINESS INSIDER
MEDIA PLANET
InvestmentNews

AFCPE Members receive priority on media opportunities!

Social & Editorial Recognition

Let us spotlight your work and increase your reach and recognition on AFCPE's blog and social media platforms!

Whether it’s through a #ResearchWednesday tweet, a #FridayFollow spotlight, or a reshare of your latest endeavor, we are here to support the good work you are doing in the field.

We love telling your story!

#FridayFollow

Every Friday, on the AFCPE blog, we feature a professional who is making an impact in their community or the field!

#ResearchWednesday

This weekly feature is a great way for you to raise awareness for your **research.**
It’s also a great opportunity for **practitioners** to learn more about the research being done and how to use it in practice!

Professional Development & Career Growth

*Mentor*Connect Program

At AFCPE, we believe in the value of connection and the importance of relationship building, which is why we are passionate about connecting financial professionals across the continuum of care.

Whether you are a young professional or considering a career change, the *Mentor*Connect program offers the opportunity to connect with a Mentor to gain insight and guidance. For more seasoned professionals, being a Mentor is a great way to share your knowledge and experience with future leaders in our industry.

You can sign up to become a Mentee or Mentor any time in your myAFCPE Membership Dashboard.

Free mentorship program exclusively for AFCPE Members!

Career Center (Employer) Discounts

Is your organization looking for employees who set the highest standard?

The AFCPE Career Center is a great resource to post job openings and find a highly qualified professional to fill the role!

Once posted on the Career Center, AFCPE will share your job posting across its social channels and via email to AFCPE professionals.

50% discount for AFCPE Members (up to $175 in savings per listing)

Professional Development Webinars

All AFCPE sponsored webinars (both live and on demand) are **FREE** to AFCPE members!

Partnering with experts in the field, these webinars provide you with new knowledge and skills for you to use in research, education, and practice!

For AFCPE certified professionals, they are a great way to knock out your CEUs!

A savings of more than $700/year!

Topics include:

- Making Financial Literacy Fun!
- FDIC Deposit Insurance and You
- Student Financial Aid 101
- Getting Comfortable with Your Coaching Style
- And more!

FPA Connect Webinars

AFCPE partners with the Financial Planning Association (FPA) to deliver a Financial Counseling Community webinar. All webinars are pre-approved for 1 CEU for AFCPE certified professionals.

This professional development webinar is only open to FPA and AFCPE members. All topics are selected to enhance the skills of financial professionals.

Webinars are recorded and slides and recordings (of both current and historic webinars) are available on demand.

FREE and available exclusively to AFCPE Members!

FPA CONNECT

Topics include:

- Financial Self-Care: It's Not Just for Clients
- From Research to Practice: Understanding Underserved Populations
- Bankruptcy Q&A
- How can Psychology Enhance Estate Planning and Financial Planning?
- And more!

Discounts on AFCPE® Certifications

You do not need to be certified to be an AFCPE member – but if you're thinking about it, now is a great time to register!

AFCPE Members save $50 off the registration fee for the AFC® or FFC® certification program.

AFC® CERTIFIED

FFC
Financial Fitness Coach

Savings of $50!

Discount on AFCPE® Essentials Trainings

New tools for your toolbox!

Money Management Essentials is a great way to build your financial foundation – ideal for students, volunteers, and service professionals looking to expand their knowledge. It's also a good stepping-stone to the AFC®!

Building upon the AFC® as a foundation, we are working to expand our essentials training courses. New courses are coming in 2020 and AFCPE members will receive a discount!

COMING SOON!

- Financial Inclusion Essentials
- Military Essentials
- Housing Essentials
- College Finance Essentials

Save $25 off each Essentials course! New courses coming in 2020!

Credit Builders Alliance (CBA) Discounts

In partnership with CBA, AFCPE Members employed by organizations eligible for CBA Membership may receive:

- $50 off first year of CBA membership for new members.
- $100 off set-up fees for new services (i.e. CBA Access, CBA Reporter) if set-up within 6 months of new CBA membership.
- 30% off all e-Learning courses available on CBA's Training Institute website: http://cbatraininginstitute.org/

CREDIT BUILDERS ALLIANCE

Strong partnerships = More benefits & savings for you!

DataPoints Discounts

In partnership with DataPoints, AFCPE Members will receive:

Access to the platform for the discounted rate of **$59/month per user** (compared to standard pricing).

DataPoints provides financial professionals with the tools they need to manage the behavioral side of their practice.

DataPoints®

Strong partnerships = More benefits & savings for you!

Change Machine Discounts

In partnership with The Financial Clinic, AFCPE Members will receive:

- 50% first year discount on Change Machine Basic & Enterprise licenses
- 25% off license renewals for Change Machine Basic and Enterprise licenses
- Free Community licenses (access to Share)

Change Machine
Powered by The Financial Clinic

"Change Machine is the financial coaching platform built by practitioners for practitioners, delivering the tools, tips and tricks you need to embed a gold standard coaching model, manage customer data and amplify your impact."

Strong partnerships = More benefits & savings for you!

Professional Liability (E&O Insurance)

Errors & Omissions (E&O) Insurance
In partnership with AdvisersGold Select, AFCPE Members receive additional E&O insurance coverage benefits:

- Expended coverage to protect you from any vicarious liability arising from your members of, or association with, an approved association.

- A 7.5% annual premium discount.

We also continue to explore other E&O insurance opportunities for our members with “Financial Consultant quotes” also available through BizInsure.

LOCKTON® AFFINITY

bizinsure

AFCPE continues to support the ever-evolving needs of our members!

Special Member Rate to attend the Annual AFCPE® Symposium

- **Learn** – from passionate experts from across the country.
- **Engage** – with professionals who have impacted financial well-being in different ways.
- **Connect** – with other experts who are committed to providing the highest standard for financial counseling, coaching, and education.

Save the Date:
2020 AFCPE Symposium
November 18-20, 2020
New Orleans, LA

AFCPE Members save $100!

CONNECT EMPOWER IMPACT

Value of AFCPE Membership

Sylvia Watford, AFC®
AFCPE® Member
Current Diversity and Inclusion TF Chair

"AFCPE Membership allows me to actually have a voice in what goes on with AFCPE in terms of the policies that are made, the opportunities to be a part of a committee, and [plus] the resources & the benefits!"

Elaine Luttrull, AFC®, CPA®
AFCPE® Member

"I love being a mentor because the energy and enthusiasm I get from my mentee reminds me of my own energy and enthusiasm from when I was a bit younger... And that reminds me why I do this work in the first place. It's also helpful to take the time to reflect on what I do and how I do it... I'm sharing the info with my mentee, but it also helps me clarify and think through things as well."

Dr. Allen Ammerman, Ph.D.
AFCPE® Member

"I love AFCPE because of how people-focused the community and organization is. It puts money in its proper place. Not something that is an end in itself, but simply a resource to be managed to help individuals and families achieve their non-financial goals."

A 1-pager to share the value of membership with your employer!

AFCPE® Member Savings Summary

Free:

- AFCPE-sponsored webinars (live and on-demand)
- FPA Connect webinars

Which means… It's possible to earn all CEUs required to maintain an AFCPE certification for the low cost of your annual membership!

Discounts:

- AFCPE Certifications Registration
- Essentials Courses
- AFCPE Symposium
- Career Center Listings (Employers)
- Partner Resources, including:
  - E & O Insurance
  - Change Machine
  - CBA Membership
  - DataPoints

A value of $2,500+ for $150 or less!

Benefits:

- Strong Professional Network
- Award Recognition
- Grant Funding
- Interactive Message Board
- Journal of Financial Counseling and Planning
- *The Standard* – Quarterly Newsletter
- Bridge between research & practice
- Mentorship Program
- Task Force Involvement
- Social & Editorial Recognition
- Media Opportunities
- Virtual meet-ups

JOIN THE AFCPE® COMMUNITY!