



WELCOME TO YOUR
AFCPE[®]
MEMBERSHIP

Certification supports your client...
Membership supports YOU!



Welcome to your professional home!

Whether you are new to the AFCPE® family, or a long-time member, we are grateful and excited to have you be an integral part of our amazing community!

You are passionate about helping individuals and families obtain financial security, and our goal is to support you! At AFCPE we meet you where you are:

Listen: We get to know you and your WHY. Where are you now and where do you want to go?

Guide: We provide you with options based on your goals and provide recommendations to help decide what is best for you.

Connect: We connect you to our professional community, development opportunities, and timely news and research.

Support: We support you along your professional journey - with education, resources, and people who are committed to a common vision.

Read on to learn about all the benefits of AFCPE Membership. We look forward to supporting your professional goals!



Table of Contents



Life Long Learning

Professional Development Webinars	07
FPA Connect Webinars	08
Virtual Member Meet-Ups	09
Get Certified!	10
Essentials Courses	11



Career Development & Growth

AFCPE Job Board	14
-----------------	----



Experience AFCPE

AFCPE Symposium	16
-----------------	----



Get Connected, Stay Connected

Member Exchange <i>Member Forum</i>	18
Download Our App	19
AFCPE Member Search Tool	20
Join a Task Force	21
AFCPE Empowerment Communities	22



Media & Publications

Become a Media Source	24
Money Mindset Blog	25
The JFCP Journal	26
Membership Monthly Minute	27
<i>The Standard</i> Quarterly Newsletter	28



National Recognition & Grant Funding

Annual AFCPE Awards	30
Mary O'Neill Mini Grant	31
Insight to Impact Initiative	32



Member Only Discounts

AFCPE Members Save!	34
---------------------	----



Prestige of the AFCPE® Member logo	36
------------------------------------	----

“

Since becoming a member, I have been thrilled with the number of ways to be involved with the AFCPE community, virtual meet-ups, Mentorship connection, Task Force committees... to name a few.

I am beyond grateful for these experiences!

”

Melissa Mittelstaedt, AFC® Candidate



A man with short brown hair and glasses is smiling while writing in a white notebook. He is wearing a denim shirt. The entire image is covered with a semi-transparent yellow filter. The text "Life Long Learning" is written in white, bold, serif font across the center of the image.

Life Long Learning

Professional Development Webinars

AFCPE Membership gives you access to exclusive professional development resources so you can be confident that your expertise is relevant and up-to-date.

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

Earn CEUs and Experience Hours - the easy way! We take the guesswork out of choosing courses. All professional development webinars are preapproved for experience hours or CEUs!

The best part? All AFCPE sponsored webinars (both live and on demand) are included in your AFCPE membership! This is a savings of \$550 a year!

STICKY SITUATIONS: CROWDSOURCING SOLUTIONS TO REAL WORLD CHALLENGES

Thursday, July 14, 2022
12 PM EST



AFCPE professionals have a wealth of experience and information to share. This webinar is an opportunity for you to share what you know and to learn from others as we explore possible solutions for real-life financial counseling scenarios. Be sure to bring your A-game – these scenarios are very challenging!

CONTINUING OUR JOURNEYS: MOVING TOWARD ALLYSHIP, ACCOMPLICES AND PARTNERSHIPS OF ACCOUNTABILITY

Thursday, September 8, 2022
12 PM EST



During this learning opportunity, we will explore the roles and responsibilities that come with moving toward being an effective and authentic ally, accomplice, or supporting partnerships of accountability. Join us to explore our individual and collective work at the four levels – personal, interpersonal, institutional and cultural levels.

More information available at afcpe.org/events.

FUTURE FINANCIAL PLANNING FOR PEOPLE WITH DISABILITIES: A NATIONAL STUDY ON WHAT'S WORKING AND WHAT'S NOT

Thursday, October 13, 2022
12 PM EST



For many people with disabilities and their families, future financial planning is overwhelming and unnecessarily challenging. They sometimes struggle to navigate complex and siloed systems to find professionals who have the knowledge and experience needed to help them secure their finances, benefits, and futures. During this session, we will share the results of a national study of more than 4,000 people with disabilities, their families, and professionals in related fields. We will present what we learned about people's experiences and some challenges related to future financial planning, as well as solutions that help their planning efforts.



FPA Connect Webinars



PRACTICAL WAYS TO DECREASE YOUR CLIENTS' MONEY ANXIETY

THURSDAY, JUNE 16, 2022
12:00 PM ET

People experience money anxiety and stress, even when their finances are objectively doing well. In this webinar, Spencer Sherman will explain how to bring the emotional intelligence of mindfulness to money to reduce financial stress. This program will offer practical techniques to help train clients to become less reactive to the ups and downs of the markets, their careers, and their personal lives. The goal is for clients to realize that their money stress is more within their control than they think and, in the process, achieve real financial freedom.

For more information, visit: www.afcpe.org/events



PLANNING CONSIDERATIONS FOR UNMARRIED COUPLES

MONDAY, JULY 18, 2022
12:00 PM ET

As grey divorce is on the rise, there is a similar trend that divorce is falling among the younger demographic as per US census data. When one looks to the numbers, we see that many more couples are intentionally cohabitating, and this may be for a plethora of reasons.

This webinar is for new and experienced financial counselors open to a better understanding of the emotional and financial needs of a growing demographic of unmarried young and late-life couples (after divorce) and expanding their conversations in a supportive and compassionate way- while providing strategies to help mitigate their health and financial challenges.

For more information, visit: www.afcpe.org/events



FINANCIAL INFIDELITY

THURSDAY, AUGUST 18, 2022
12:00 PM ET

Financial infidelity can happen when couples combine their finances and then lie to each other about their spending. This type of infidelity can have devastating and severe consequences on relationships, such as couples, parents/children, friends, or roommates. During this webinar, we will discuss what financial infidelity is, how to recognize it, ways to overcome it, and steps to take to avoid it.

For more information, visit: www.afcpe.org/events



AFCPE partners with the Financial Planning Association (FPA) to deliver a Financial Counseling Community webinar each month which are pre-approved for 1 CEU for AFC Certified Professionals and 1 Experience Hour for AFC Candidates.

These professional development webinars are exclusive to only FPA and AFCPE members. All topics are selected to enhance the skills of financial professionals.

Webinars are recorded and are available to members on demand.

Available exclusively to AFCPE Members!



Virtual Member Meet Ups

For Members, By Members.

Each month, AFCPE members gather virtually to connect with one another, learn from each other, and share 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!



Topics Include:



Virtual Member Meet Up
Creating & Maintaining a
Finance Blog

Tuesday, February 1, 2022
12 - 1 PM ET



Virtual Member Meet Up
Creating Online Courses to
Spread Financial Literacy

Tuesday, May 3, 2022
12 - 1 PM ET



Virtual Member Meet Up
Let's Talk About Military Transition &
Retirement Benefits

Tuesday, July 12, 2022
11:30 AM - 12:30 PM ET



“

You settle for nothing less than excellence in your career—
but it's not the only thing that drives you. With an AFC® certification, you turn your passion for people into the power to make a meaningful difference in your clients' lives.

”



Get Certified!

Elevate Your Knowledge

Become an Accredited Financial Counselor®

Now is a great time to get certified!

Providing a holistic approach to personal finance and gain credibility that will instill TRUST with your clients.

Members save on certification!

AFCPE Members get \$100 off their AFC exam



Register Today!

Essentials Courses

Master the Skills. Collect the Badges.



Money Management Essentials

Taking you through the essential steps of money management to provide you with a firm financial foundation - for you and those you serve



Financial Inclusion Essentials

Teaching you the essentials of assisting clients with disabilities and their families as they move towards financial inclusion and well-being.



College Finance Essentials

Teaching you all aspects of college finance, including choosing the right school, the tax benefits of higher education, applying for and paying back student loans, and preparing for a career.

Essentials Courses

Master the Skills. Collect the Badges.



Military Essentials

Giving you the tools to better support the unique financial challenges and opportunities of military service members, veterans, and their families.



Diversity, Equity & Inclusion Essentials

A self-paced, online professional development course that is designed to give you the tools and resources needed to improve your ability to serve clients from all backgrounds and walks of life.

Save on your education!

AFCPE Members get 10% off Essentials Courses

A woman with curly hair and glasses is smiling while working on a laptop. She is wearing a patterned cardigan over a light-colored top. The background is a blurred office setting. The text "Career Development" is overlaid in a large, white, serif font.

Career Development



AFCPE Job Board

Employers are looking for your unique skills & knowledge!

The job board is the perfect place to find job postings specifically geared to financial professionals & AFC's.

Is your organization looking for professionals who set the standard?

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

*Members save
50% on job
postings*



Experience AFCPE



AFCPE Symposium



Experience the Learning.

Experience the Ideas.

Experience the Connection.

Experience the Magic...

of the AFCPE Symposium.



“

"Attending the annual AFCPE Symposium allows me to network with other professionals from around the country. I leave the symposium re-energized about my work, and I can't wait to put all I have learned into practice back home."

”

*AFCPE Members save on
Symposium Registration!*

[LEARN MORE](#)

A group of people are gathered around a table in what appears to be a meeting or collaborative work environment. The image is overlaid with a semi-transparent teal color. The text 'Get Connected' is in a white serif font, and 'Stay Connected' is in a white italicized serif font.

Get Connected
Stay Connected



AFCPE Member Exchange

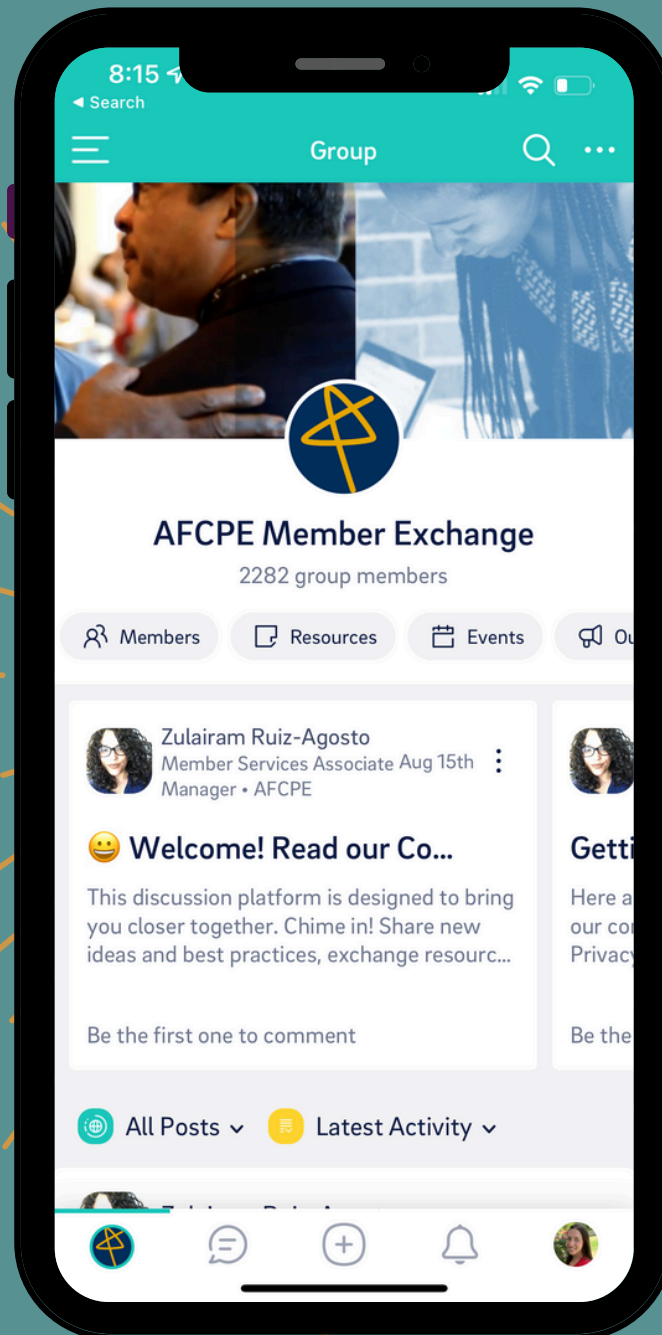
As an AFCPE Member, your membership contains exclusive access to the AFCPE Member Exchange - where you get to network with fellow members, discuss industry trends, and gain access to all that your membership has to offer.

Utilize our directory, discussion forum, and volunteer portal to grow your professional network and industry influence.

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

AFCPE Member Exchange App

Download the Mobilize app to access the Member Exchange and all the other AFCPE online communities you belong to!



Available on Apple &
Android devices!

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.

Join a Task Force



AFCPE Membership provides you with a platform to help advance the field and create lasting impact. There are at least 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!

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

- Awards
- Symposium
- Newsletter
- Student
- Government Relations
- Member Engagement
- Diversity & Inclusion
- Research to Practice

A photograph of three women in a professional setting. On the left, a woman with curly hair is smiling and leaning forward. In the center, a woman with long dark hair is smiling. On the right, a woman with curly hair and glasses is smiling. They are all looking towards the center. In the background, there is a corkboard with several sticky notes.

Expand your Network!

AFCPE Empowerment Communities

AFCPE Empowerment Communities are specialized discussion board communities. Topics are determined by members and allow you to connect with one another around shared professional interests or common lived experiences. Affinity groups are intended to be safe, supportive spaces to exchange ideas, share experiences, and gain new resources for professional growth and development.

A woman with short brown hair and glasses is sitting at a desk. She is wearing a grey sweater and is holding a small, light-colored object in her hands. The background is a blurred office setting with bookshelves. The entire image is covered with a semi-transparent blue overlay.

Media & Publications

Become a Media Source



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

When AFCPE receives a media call, we notify AFCPE Members and AFC certified professionals. Once published, we promote thought leadership throughout social and email channels.

*Members receive priority
on media opportunities!*

*AFCPE Members
have been quoted in:*

Forbes



The New York Times

InvestmentNews

**BUSINESS
INSIDER**



**MEDIA
PLANET**



Contribute to Money Mindset: Practical Insights for Everyday Finances



Elevate your Brand!

AFCPE Members who hold the AFC® and are in good standing are welcome to contribute to Money Mindset: Practical Insights for Everyday Finances.

Money Mindset is a monthly blog providing readers with personal finance insights and education and Members to build thought leadership while elevating their professional brand.

We are seeking submissions on topics in line with AFC expertise: credit management, debt management, student loans, financial behavior, savings, and overall personal finance.

Journal of Financial Counseling & Planning



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

AFC Certified Professionals & Candidates: Earn CEUs/Experience Hours!

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!

*3 Online Issues
Published
Annually.*

*Members also
have free early-
access to accepted
papers.*

AFCPE Membership

The Monthly Minute



Keeping You Informed!

Each month, you'll receive a monthly e-blast 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!



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!

The Standard is open access to anyone in our field, but the articles are influenced by AFCPE Members. As a member, you can serve on the Newsletter Task Force or contribute an article.

[View issues of *The Standard* here!](#)

Share your expertise!

Whether you are a seasoned writer or want to be published for the first time, we can work with you to formulate an interesting topic and guide you through the publishing process.



National Recognition & Grant Funding

Awards Recognition



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.

** Indicates a monetary prize for the winner.*

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



Mary O'Neill Grant Funding

\$3,500 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.

[Learn more!](#)



The Insight to Impact Initiative

Advancing Personal Finance Through Collaborative Research & Practice

The Insight to Impact Initiative seeks to fund collaborative projects between researchers and practitioners that build connections, develop models, expand understanding of evidence-based practices, and increase access, equity, and capacity for financial professionals and communities served.

[Learn more!](#)

Program Goals

Connect people, ideas, and projects to bridge research and practice; expand the use of evidence-based approaches; develop and share models and best practices in personal finance; promote equity, access, and capacity-building among researchers, practitioners, and the communities they serve; and advance financial knowledge for the public.

A man with a beard and short dark hair is smiling while looking at a laptop screen. He is wearing a light blue button-down shirt with small dark dots. His hands are on the laptop keyboard. The background is blurred, showing what appears to be an office or modern interior with wooden beams. The entire image has a warm, golden-orange color overlay.

*Member Only
Discounts*



AFCPE

Members Save!

Members receive a variety of discounts to support their work and career.

Members save on:

- AFCPE Symposium
- AFCPE Certification & Training
- Resources & Tools for your practice

Looking to hire?

Members save on job postings in the AFCPE Career Center.

Work hard, play hard!

AFCPE Members also save on travel & entertainment through MemberDeals!

Head to your [membership dashboard](#) to access your savings!



And More!

A faint, light blue background logo of the AFCPE is visible behind the text. It features a stylized circular emblem with a cross-like shape inside, and a long, thin vertical line extending downwards from the bottom of the circle.

Prestige of the AFCPE[®] Member Logo

The AFCPE[®] Membership Logo

Setting the Standard

AFCPE Membership attracts a diverse group of professionals in the field of personal finance and our diversity is what makes AFCPE Membership so unique to you. The logo you place proudly after your name acts as a first impression, a subtle and unique visual communicator, and a stamp of quality that you belong to a community that is committed to advancing the field of personal finance.

Please help us share and spread the great work that our Members are doing and the opportunities that membership provides by proudly displaying your AFCPE Membership logo in your work.

Head to the [Membership Dashboard](#) and access the AFCPE Member Logo and Guidelines!

Add it to your business card, email signature, letterhead, website, and more!



Connect



Empower



Impact

The Value of AFCPE[®] Membership