Financial Coaching Network
Bi-Monthly Peer Call

October 17, 2019, 3-4 PM ET

Today’s Topic:
New Brief *On the Frontlines* lifts up Coaches’ Perspectives
Welcome

Tupa Hoveka
Program Associate, Field Engagement
Prosperity Now
Housekeeping

- This call is **being recorded** and will be mailed to registrants and available online within one week.

- **This is a group discussion!** However, all webinar attendees are muted at the start to ensure sound quality.

- **Share comments or ask questions** at any time by raising your hand to be unmuted or typing the question into the text box on the control panel.
  
  *Tip: Phone audio works best. Be sure to enter your audio PIN!*

- If you experience any technical issues, email **gotomeeting@prosperitynow.org**.

Trouble dialing in? Just listen through your computer with speakers or headphones!
Getting the Most Out of Today’s Call

- Join from a **quiet space**
- Grab a **coffee** or snack and settle in
- **Engage!** Send us your questions and comments as you listen
- **Reflect** on ways to **apply what you learn today** to your own work
Welcome

Fran Rosebush Baylor
Director, Field Engagement
Prosperity Now
Today’s Agenda

✓ Exploring Today’s Topic – New Brief: *On the Frontlines*

✓ Panel Discussion – We’ll hear from a few of your peers

✓ Group Discussion – What’s your experience?

✓ Next Steps & Close
Newly released: On the Frontlines - Insights from Financial Coaches
Poll Question

- What's your role with financial coaching? (select all that apply)
  - Financial coach
  - Program Manager or Leadership
  - Funder supporting coaching programs
  - Intermediary supporting coaching programs
  - Other (chat at us what your role is)
Welcome

Shelley Marquez
Community Relations Sr. Manager,
SVP Community Relations
Wells Fargo
Introducing *On the Frontlines*

Hiba Haroon
Associate Director,
Savings & Financial Capability
Prosperity Now
Practitioner Discussion

Rosie Papazian  
Program Manager  
New Economics for Women

Timothy Fraylon  
Case Manager/Facilitator  
STRIVE Hartford

Robert Aitken  
Executive Director/Coach  
Leech Lake Financial Services

Edi Flores  
Asset Coach  
New Economics for Women

FINANCIAL COACHING NETWORK
“Prior to working at NEW, I worked for a very evil mortgage provider and started seeing how deceitful and predatory the lending space is… I knew that in my next career move I wanted to work with Latinos and African Americans to get them into homes and bridge that wealth gap. When I am coaching, I try to create a space where we are all equal. I am the same as you. I don’t want anyone to be treated as my family was. I require staff to be very personable and authentic in their intentions.”
Edi Flores

“It’s about self-empowerment. The great thing about financial coaching is that a person can come in and actually learn how to address an issue by themselves so that they can address it in the future without us.”
Timothy Fraylon

“I want to be the person to do everything in house for them—open up accounts, give them resources to invest in stocks, give them access to opportunities. We only have check-cashing places around here so being able to do everything in-house would be great.”
“Financial coaching is about creating a healthy community—getting at what’s happening in this community that’s keeping it from becoming a healthy community. Coaching gets at the heart of it.”
“We had a participant whose credit report showed that he owed child support when he didn’t. All he needed was a letter disputing this error so that he could begin building credit. Credit management is a huge success for us.”
Rosie- *Training Supports*

“In the past when we had more funding, we didn’t have managers providing 1-1 services. But I don’t think I could ever let [coaching] go. It’s important for me to understand what’s going on with participants since I am responsible for grants and partnership development.”
“I want to be the person to do everything in house for them—open up accounts, give them resources to invest in stocks, give them access to opportunities. We only have check-cashing places around here so being able to do everything in-house would be great.”
“Peeling back the layers so participants start making progress on the goals they set for themselves.”
The earlier, the better: Coaches want to see financial education and coaching introduced in school settings.

More reach: Financial coaching programs are great, but coaches want to reach more people.

Intergenerational wealth: Coaches want to see financial coaching serving the entire family and the focus being more on generational wealth and investment.
Open Discussion

What are your questions, thoughts or ideas?
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What questions do you have?
Share them in the Questions box!
Next Steps

- Please **complete the survey**!
- Sign up for other **Networks and Campaigns** to stay in the know about issues you care about
- Let us know your **suggestions** for future call topics
- Volunteer to **lead** a future call!
- **Save the Date** for the next Prosperity Summit! Sep 30-Oct 2, 2020 in National Harbor!
Expand Your Networks with the Prosperity Now Community

Sign up for listservs and working groups, volunteer to facilitate peer discussions, serve in a leadership role—and more!

- Affordable Homeownership Network
- Campaign for Every Kids Future (Children’s Savings Accounts)
- Financial Coaching Network
- Innovations in Manufactured Housing (I’M HOME) Network
- Health and Wealth Network
- Racial Wealth Equity Network
- Savings Network
- Taxpayer Opportunity Network (VITA/community tax prep)

Visit any of the above Networks at prosperitynow.org/get-involved to get started.
Take action with Prosperity Now Campaigns!

Sign up to stay informed about the latest developments and opportunities to take action by joining one of our four federal policy campaigns.

**AFFORDABLE HOMEOWNERSHIP**
Homeownership is key to building wealth. Together, we will advocate for products and policies that provide more affordable homes to more people.

**CONSUMER PROTECTIONS**
Consumer protections create more fair, more transparent financial markets. Together, we will ensure consumers keep the safeguards they deserve.

**FINANCIAL SECURITY**
Safety net programs help protect vulnerable individuals and families from falling deep into poverty. Together, we will protect programs like SNAP, IDAs and more to help those in need when they need it most.

**TURN IT RIGHT-SIDE UP**
The vast majority of tax incentives go to those at the top, not to those who need it most. Together, we will turn our upside-down tax code right-side up.

Visit any of our Campaigns at [https://prosperitynow.org/take-action](https://prosperitynow.org/take-action) to learn more and join.
Thank You!

Please complete our survey and we’ll see you on the next call!