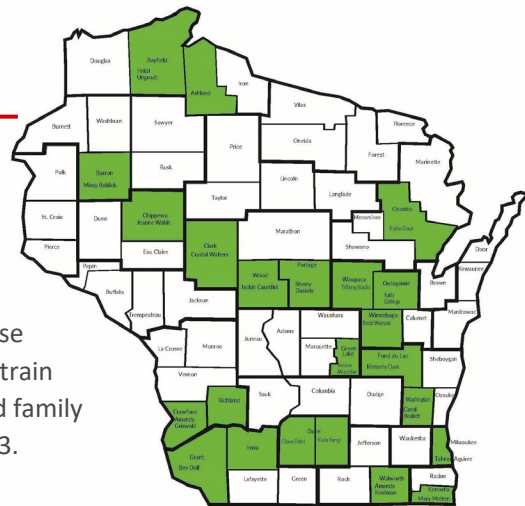




Extension

UNIVERSITY OF WISCONSIN-MADISON



Encouraging Financial Conversations



Encouraging Financial Conversations (EFC) is a six-module course designed for social workers and other helping professionals to train them in how to help their clients set and achieve individual and family financial goals. Below are results of this program’s work in 2023.

92%

Feel more prepared to bring up a financial topic with clients

87%

Plan to incorporate financial topics into conversations with clients.

90%

Understand the role they can take in working with clients on financial concerns.

What are people saying?

When asked about something meaningful they learned that they will apply from the course, participants shared:

- The trauma informed care strategies and approaches offered in the class are a great guide for us to use as coaches/counselors.
- Confidence. This was a really great course to take and what is most meaningful to me is now having this wonderful toolbox giving me the confidence to discuss finance in depth with my clients.
- I really like the approach of building financial capability versus just literacy and knowledge.
- I feel more confident in supporting my client's financial struggles.
- Having real-life scenarios as training provided the most benefit along with using the workbook full of ready-to-use documents!