T: +27 51 401 2823 | **E:** sfpl_appl@ufs.ac.za | **www.ufs.ac.za/sfpl**

UFSUV | UFSweb | UFSweb | ufsuv

Inspiring excellence, transforming lives through quality, impact, and care.

UNIVERSITY OF THE **FREE STATE**
UNIVERSITEIT VAN DIE **VRYSTAAT**
YUNIVESITHI YA **FREISTATA**

UFS **LAW**
SCHOOL OF FINANCIAL PLANNING LAW

Compiled by the

School of Financial Planning Law

University of the Free State
PO Box 339
Bloemfontein
9300

T: +27 51 401 2823

FINANCIAL COACHING

12 week, intensive coaching course

The programme will run four times in 2022.

The commencement dates are as follows:

- 17 January 2022
- 5 April 2022
- 11 July 2022
- 5 September 2022

PRESENTED BY

The School of Financial Planning Law (UFS)
In collaboration with
Hendrik Crafford (Coach and Industry Expert)

Adviser Concerns

Advisers face concerns on a daily basis, for example:

- The need to understand what is important to you and what might be getting in the way of achieving your goals and how this impacts your practice and the advice you give to clients.
- Not necessarily sure how to effectively guide clients through transitions in their lives (e.g. divorce, job changes, death) and having doubts about what advice to give.
- The need to help clients see how their attitudes towards money and finance influence their ability to accumulate and preserve wealth, but not always being able to do this as effectively as possible.
- Unsure about how to discourage clients from making emotional decisions regarding their finances in order to make better informed financial decisions.
- The need to help clients define their real life goals, based on what is important to them, and guide them to achieve in financial terms.
- Not knowing how to build capacity and resilience for yourself and your clients in the face of an uncertain, complex and rapidly changing world.

The programme will enable you to:

- Engage in a powerful, highly effective approach to coaching, leading, and advising for positive change.
- Learn how to use language to more effectively address the concerns of your clients and in doing so building trust, long-term relationships and increased value.
- Understand moods, how they influence actions, and how to shift and manage them to get better results.
- Develop a vocabulary to enable you to observe the narratives that impact on your clients financial and personal wellness.
- Support clients to design and live a life of purpose.

What you will learn

Understand the conceptual framework and principles of Ontological Coaching

- Understand how specific linguistic actions shape reality and how they can be used effectively in coaching and leadership to shift behaviour.
- Apply a different and deeper approach to the role of language (listening, questioning and speaking) in coaching and conversations.
- Understand the pivotal role of moods and emotions in coaching for deep and sustainable change.
- Recognise, work with and shift the ways moods and emotions impact communication, behaviour and performance.
- Observe and work with the interconnection between basic moods, body posture and language.

Who will benefit from the programme?

- Financial advisers;
- Para-planners;
- Managers who deal with financial advisers and the advice processs;
- Trainers who deal with financial advisers;
- Pension fund administrators, advisers and counsellors;
- Coaches and psychologists who want to expand their field of expertise.

How is training delivered?

- 12 week online programme.
- The material consists of animated video's, reading material, reflections and assessments, which include practical coaching and feedback.
- 12 online coaching circles will be hosted to support the learning.
- The programme will give you opportunity to apply the material to your own learning and development, as well as in your practice, to better serve your clients.
- The programme is specifically structured in a way to share coaching theory and application, however also to explore how to integrate learning into the financial planning process.
- Various tools and templates will be shared with you.
- Upon completion of the programme, you will have access to the South African Financial Coaching forum, to share and engage, in order to extend your learning.

About the facilitators:

Hendrik Crafford is a Professional Certified Integral coach with years worth of experience in the insurance and financial services sector and has a passion for financial planning, practice management and financial prosperity. He has extensive knowledge of agency, Bancassurance and independent financial advisory business from an advice, distribution and management perspective. He is also a practicing Financial Coach.

The Cost? R 9 900

Where to register?

Click here to download application form

Upon successful completion of the programme, participants will receive a certificate of completion.

The workshop is accredited by the Financial Planning Institute of Southern Africa (FPI) and is an approved COMENSA (Coaching and Mentors of South Africa) Bronze Training programme.

Participants will receive a total of 26 CPD points which are allocated as follow: 9 CPD Points/hours Technical, 13 CPD Points/hours General, 4 CPD Points/hours Ethics & Practice Standards upon completion of the programme.

What will the learning outcomes be?

CORE LEARNING AREAS	OUTCOMES
Introduction to Coaching	Understand the difference between advising, coaching, mentoring, training, management and leading. Understanding directive and non-directive coaching. How can financial coaching and financial planning integrate?
Ontological Framework	Understand the concept of Ontological Coaching and explore the power of conversation on vertical development applying the model.
Continues learning from breakdowns	Explore enemies and friends of learning and how it impact on our and others' ability to be open for possibilities. Exploring how clients' values and strengths support their purpose and happiness.
Moods	Understanding the Basic Moods model and how our moods influence the way of observing the world we live in.
Language and Listening	Explore language as a two-way process of speaking and listening, and the impact of the voice in our heads on these conversations as well as how we filter and distort information. How do money behaviours and money scripts influence our clients, money decisions? Can assessments add value to the financial planning process?
Language and Questioning	Explore the power of questioning to deepen our listening and understanding. Exploring and clarifying our clients purpose and goals.
Basic Language Acts	Understand the use of Basic Language Acts: Assertions, Assessments, Declarations, Offers, Requests and Promises. How to use grounded assessments to help clarifying disabling believes? What is the power of having clear declarations?
Body as teacher	Understand the power of our bodies and how we can use our bodies to ground and support ourselves, towards a better way of being, mindful financial planning, spending and investing.
Ethics of Coaching	As a coach, it is also important to understand the ethics of coaching and how to use coaching in a professional and ethical manner.
Trust	Understanding the importance of trust and how it fits into your role as a planner and coach.
Financial Behaviour	Understanding the impact of our biases, through how we make ungrounded assessments.

Compiled by the

School of Financial Planning Law

University of the Free State
PO Box 339
Bloemfontein
9300

T: +27 51 401 2823