

# FINANCIAL COACHING WORKSHOP

## First of its kind in South Africa – be ahead of the curve

A growing trend in the financial landscape is the emergence of FINANCIAL COACHING.

The School of Financial Planning Law (UFS) is presenting an innovative and ground breaking FINANCIAL COACHING workshop in collaboration with Karen White, an experienced master certified coach and Hendrik Crafford, an experienced professional coach and financial industry expert.

This workshop will be presented over 3 days that provides a substantive practical and experiential introduction to using Ontological Coaching principles to equip participants to be more effective financial planners.

The goal of a financial coach is to educate clients on the basics of personal finance and, as a team, create a spending plan that reflects the values and goals of the client. The coach then empowers clients to take responsibility for their decisions, supports their continual learning and growth, and serves as an accountability partner throughout the process. It also enables clients to have critical financial conversations with themselves and their loved ones.

The practical approach of this workshop will enable participants to apply the knowledge and skills acquired during the workshops to both their financial planning practices as well as their personal lives.

## The learning experience will enable participants to:

- Engage in a powerful, highly effective approach to consulting, leading, and coaching capable of generating deep 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 narrative's that impact on your clients Financial and Personal Wellness.
- Design critical conversations.

Upon successful completion of the workshop, participants will receive a certificate of completion. The workshop is FPI accredited and participants will receive 23.5 CPD points on completion of the workshop.

## About the facilitators:

Karen White is an ICF Master Certified coach with over 3 000 hours of coaching. She has her own business The Human Connection where she focused on executive coaching and leadership development for the past 13 years. She is also the director of training and a facilitator for the Ontological Coaching Institute (Australia), co-leading the 18 month coach training and leadership programme.

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

### Workshop Date:

21–23 May 2019

DAILY 08:30 to 17:30



### Venue:

Old Mutual House,  
33 Klaassens Road,  
Constantia, South Africa.



### Cost:

R14 900, cost includes training material, assessment, meals and refreshments during the workshop.

### Contact:

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