

APPROACH YOUR BOSS FOR SUPPORT

To earn the Accredited Financial Counselor® (AFC®) certification



As a professional committed to financial well-being and client empowerment, you understand how important it is to offer sound, ethical financial guidance, especially in uncertain times. But with rising financial stress, shifting economic landscapes, and increased client complexity; it's harder than ever to meet these needs without specialized training.

That's where the **AFC certification** comes in. Developed by **AFCPE**, the AFC equips professionals with practical, evidence-based training in financial counseling. It helps individuals and families reduce financial stress and build long-term financial stability. You know the impact this training can have. Now it's time to build the case for support.

Making Your Case: Discussion Starters

Use these discussion starters to prepare for a conversation with your supervisor. These prompts can help you make a compelling case for tuition assistance, training budget support, or dedicated learning time.

1 How can AFC training directly support our team's mission or client goals?

Can this training help us expand financial education services, improve client outcomes, reduce financial stress, or align with our DEI or wellness initiatives?

2 What parts of the AFC certification most align with our department's priorities?

Which topics like credit counseling, housing stability, student loan guidance, or budgeting are most applicable to our current services or client needs?

3 How can earning the AFC certification improve efficiency, retention, or service quality?

Consider how the skills you gain could reduce the need for outside referrals, enhance your ability to support diverse clients, or help mentor other team members.

4 What are the financial implications of pursuing the AFC?

What's the cost of training and certification? Is funding available through department training budgets, tuition reimbursement, or outside grants? What is the long-term ROI of investing in this credential?

Preparing a Budget

Doing some research and outlining total costs, timeline, and potential ROI will help your supervisor make an informed decision. Consider sharing AFCPE's **Top Five Reasons My Employer Will Benefit** to strengthen your case.



AFC Certification®: Employer Funding Email Template

Start with an email to your manager! Below is a customizable email template with three message options depending on your goals and your employer's priorities.

<Replace and/or remove blue text prior to using this template>

Subject: Financial Counseling Training Opportunity

Alternative 1: Help Meet Organization Goals

I've been thinking about <<insert organization name>>'s commitment to <<insert company strategy/goal>> and how our team can support that mission.

I've found a financial training program that aligns with <<key topics like financial wellbeing, consumer education, DEI, economic stability>>; skills that can enhance both our client offerings and internal financial wellness initiatives.

Alternative 2: Help Meet Personal/Team Goals

I know you're always encouraging us to grow our knowledge in ways that benefit our team and those we serve. I recently found a training opportunity that would help me and <<our/my>> team strengthen our 2025 goals related to personal finance, financial literacy outreach, and community support.

The program equips professionals with practical tools and current best practices, allowing us to better assist our clients while strengthening our own professional development.

Alternative 3: Value of Training/Credentials

I'm writing to ask for your support in pursuing a professional development opportunity that will grow my expertise in financial counseling and education. I've found a program that is evidence-based, flexible, and directly relevant to my role.

The AFC® (Accredited Financial Counselor®) certification is a nationally recognized credential developed by AFCPE®. It equips professionals to help clients build a strong financial foundation, navigate financial challenges, and achieve lasting financial well-being.

This training not only increases my skills, it directly supports our organization's mission to promote stability and empowerment through financial guidance.

Benefits include:

- **Practical training** rooted in behavioral finance and client-centered support
- **Improved ability** to support diverse client needs and long-term success
- **Alignment with national standards** in financial counseling
- **A network of professionals and resources** through AFCPE®

Thanks for considering this opportunity. I'd be happy to discuss it further in person.

Sincerely,

<<Insert your name>>

5 WAYS YOUR ORGANIZATION WILL BENEFIT FROM YOUR AFC® CERTIFICATION

From helping clients manage their money to navigating complex financial issues like debt repayment or investing, financial professionals face an ever-evolving list of responsibilities. But how can they ensure they have the right mix of knowledge, skills, and confidence to handle whatever comes their way?

The AFC® Learning System was developed with input from experts in financial counseling and planning to provide professionals with a strong foundation in key topics, while building the confidence to apply what they learn. The program offers a comprehensive overview of what financial counselors need to know to competently perform their duties and prepare for the Accredited Financial Counselor® (AFC®) certification exam.

Here are five specific ways your entire organization will benefit from including AFC training:

1 PRACTICAL, CURRENT, AND RELEVANT KNOWLEDGE

The Accredited Financial Counselor (AFC) certification provides training grounded in today's financial realities. Topics include debt management, housing stability, student loans, and emergency preparedness. Certified professionals are equipped with tools they can use immediately to help clients build financial security and resilience.



2 SKILLS THAT IMPROVE OUTCOMES FROM DAY ONE

Whether serving individuals, families, or communities, AFC professionals gain strategies to assess needs, support behavior change, and drive long-term impact. The certification emphasizes applied skills over theory, ensuring counselors are prepared to deliver meaningful support from the start.

3 BUILT FOR REAL-WORLD EMPLOYEES

The AFC certification is specifically designed to meet the needs of financial practitioners and the organizations they serve. It empowers professionals to better support diverse populations, reduce reliance on external referrals, and confidently manage complex client situations.

4 A TRUSTED, NATIONALLY RECOGNIZED CREDENTIAL

The AFC is nationally recognized and backed by AFCPE, a nonprofit leader in financial counseling and education. It demonstrates your commitment to ethical, high-quality practice and builds trust with both clients and stakeholders.

5 TRAINING BACKED BY A LEADING PROFESSIONAL ASSOCIATION

For more than 30 years, AFCPE has set the standard in financial counseling. Their evidence-based, research-informed certification program is supported by a growing network of professionals who are committed to improving financial well-being for all.

To learn more about how this training can impact your organization, visit education.afcpe.org/afc-certification

