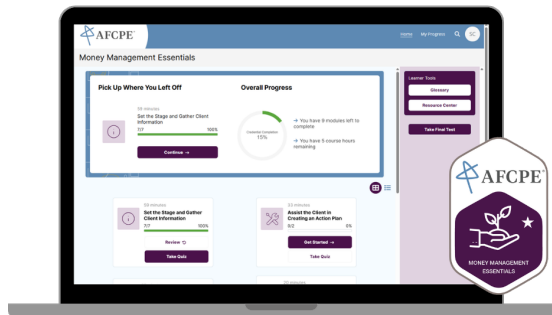


# APPROACH YOUR BOSS FOR SUPPORT



## To begin a Money Management Essentials (MME) Course



As a professional interested in financial well-being, you understand how important it is to find 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 a solid foundation of personal finance knowledge and skills.

Money Management Essentials (MME) can help you prepare for just that. Developed by **AFCPE**, MME helps professionals enhance their personal finance and financial counseling knowledge. Now that you know the impact this training can have, 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 MME 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 MME 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 completing MME training 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 MME?

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

## 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.

# Money Management Essentials: 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.

Money Management Essentials (MME) is an interactive education program developed by AFCPE®. It helps professionals master the fundamentals to address common money management challenges with confidence.

This training would not only increase 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
- **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 MONEY MANAGEMENT ESSENTIALS



From managing 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?

Money Management Essentials (MME) 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.

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

## 1 PRACTICAL, CURRENT, AND RELEVANT KNOWLEDGE

Money Management Essentials provides training grounded in today's financial realities. Topics include debt management, housing stability, student loans, and emergency preparedness. Learners leave equipped with tools they can use immediately to help themselves, or clients, build financial security and resilience.

## 2 SKILLS THAT IMPROVE OUTCOMES FROM DAY ONE

Whether serving individuals, families, or communities, MME professionals gain strategies to assess needs and drive long-term impact. MME also equips professionals with the knowledge and language to confidently engage in inclusive, culturally responsive financial conversations. The course provides practical tools and frameworks to help you connect with individuals from a wide range of backgrounds and lived experiences, making it easier to meet people where they are and build trust through respectful, empathetic dialogue.

## 3 BUILT FOR REAL-WORLD EMPLOYEES

Money Management Essentials is specifically designed to meet the needs of financial practitioners and the organizations they serve. It combines expert-backed information, with an embedded final test, providing an all-in-one training solution for organizations looking to enhance their skillset and better prepare to assist clients going forward.

## 4 A TRUSTED, RECOGNIZED EDUCATIONAL COURSE

MME is backed by AFCPE, a nonprofit leader in financial counseling and education. It demonstrates a learner's 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 learning 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/money-management-essentials](https://education.afcpe.org/money-management-essentials)