

CUSTOMER SUPPORT VOLUNTEER TRAINING

Part 2

PREPARE + PROSPER



PART 2 TRAINING OVERVIEW

Money
Conversations

Tax Time
Savings

Direct Deposit
Options

Financial
Referrals

MONEY CONVERSATIONS

PREPARE + PROSPER



WHAT'S A MONEY CONVERSATION?

- Conversation that involves financial situations and money in general
- Prompts customers to reflect on and share about their financial situation and goals
- No set agenda, but may open the door to referrals and services



POWERFUL QUESTIONS

- Goal is to invite a customer to share more during a Money Conversation
- Open ended questions
 - Avoid questions with a yes/no answer
- Customer's answers guide the discussion



Use the sample Power Questions in the CSV manual to help start or continue your money conversations.

ACTIVE LISTENING

- Hear what is being said and listen for additional meaning
- Take note of emotions and values
 - Is someone excited about a promotion at work and the new financial freedom a pay raise will provide?
 - Is someone nervous about credit card debt that's building up?
- Base your approach to customer service and offering referrals on what you hear

MONEY CONVOS IN ACTION

- Find your own flow: there's no script!
- Money conversations fit in during any part of a customer's appointment
- The Boost Your Money form can help kick off a conversation
- Go into money conversations knowing:
 - Approaches to money are very personal and rooted in our identity, beliefs, and self-worth
 - Talking about money requires vulnerability



NEW ACCOUNT OPTIONS





DIRECT DEPOSIT: SAVES TIME AND MONEY

- **Faster:** Refunds arrive in accounts automatically with less processing time no transit time
- **More secure:** Electronic transfer means a check cannot be lost in the mail or stolen
- **Easy:** Set up while filing the tax return
- **Convenient:** No need to visit the bank, credit union, or other check-casher
- **Free:** No service charge or check-cashing fee means the taxpayer gets their full refund

NEW ACCOUNT COMPARISON

Take a step toward your financial goals.

Bank with ease.

FAIR Savings

- No monthly minimum balance requirement
- Learn more on the back of this sheet

FAIR Checking

- No account overdraft fees
- \$3 monthly maintenance fee (currently covered by P+P)
- Learn more on the back of this sheet

Prepaid Debit Card

- No fee for direct deposits
- Available regardless of credit or banking history
- No monthly minimum balance requirements

Take action.

Credit Report Review

- Get a free copy of your credit report and review it with a volunteer
- Learn what to watch for on your report and how to take action

FAIR Credit Builder

- Build your credit while building your savings at the same time
- Learn more at FAIRfinancial.org

Payday Loan Help

- For loans with a payoff under \$1500, and an APR over 36%
- Must have a steady income, and have had the loan for more than 30 days



Financial Planning

- Free consultation
- Get help planning for retirement, college, and other goals

Financial Counseling

- Judgment on financial decisions
- Monthly one-on-one sessions

Financial Coaching

- Make a plan
- Discuss budget and goals
- Get your first step



Savings Builder

- An investment for up to 36 months
- Flexible savings options
- Available in many states

Child Savings

- For children under 18
- Have lived in MN for 6 months

FAIR Checking or Savings Accounts

Requirement to open a FAIR banking account

- A current ID: Driver's License, Passport, State ID, Military ID, or Tribal ID
- U.S. Social Security or ITIN Number
- Proof of address (ONLY if not current on ID): copy of a current utility bill, lease agreement, current pay stub or job offer, OR bank statement
- Must be 18 years of age or older

FAIR Checking or Savings may be good if...

- You have trouble getting a checking account at other banks because of your banking history
- You have a checking account and/or prepaid debit card and are paying high fees, like overdraft
- You are comfortable banking online or using a mobile app
- You get paid via check or direct deposit

FAIR Checking or Savings may NOT be good if...

- You have a history of actual bank fraud
- You prefer to do your banking in person
- You prefer operating in cash

CFR Focus Prepaid Debit Card

Requirement to open a CFR Focus debit card

- MN residents only: must live in the state of MN to get this product through Prepare + Prosper
- A current ID: Valid State ID or Driver's License
- U.S. Social Security Number
- Physical mailing address for the card to be sent out (P.O. boxes and general delivery are not accepted)
- Must be 14 years of age or older

CFR Focus Card may be good if...

- You are looking for something to use for direct deposit and spending for the short-term
- You want access to a large network of ATMs
- You are not looking for a banking relationship
- You fear the risk of garnishment on your account

CFR Focus Card may NOT be good if...

- You deal directly in cash
- You prefer to do your banking in person

CFR FOCUS PREPAID CARDS

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CFR FOCUS CARD OVERVIEW

- Community Financial Resources (CFR) offers the Focus prepaid card in partnership with US Bank
- Helps provide access to direct deposit for tax refunds and other deposits
- Customers can open a savings account that is linked to the card after they receive it
- Customer service for the card is available by phone anytime



REQUIREMENTS TO OPEN A CFR FOCUS CARD

- Be at least 14 years old
- Valid State ID or Drivers License
- Social Security number or ITIN
- Physical address
 - PO Box can be used for card delivery
 - General delivery not accepted

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WHO'S A GOOD FIT FOR CFR?



This product is a good fit for someone who...

- Prefers not having or doesn't qualify for a checking account
- Needs a personalized debit card to make payments online, by phone, or in-person
- Wants a new direct deposit option for their refund or other payments
- Has concerns about garnishments



This product is not a good fit if someone...

- Deals directly with cash as income (there are fees for depositing cash)
- Already has deposit accounts that they are comfortable with and have easy access to

CFR FOCUS CARD TALKING POINTS

- On-line set-up takes less than 5 minutes
- NO minimum balance requirements
- NO penalty fees like overdraft
- Free ATM networks
- Mobile app and online banking
- Use to build savings
- Use for deposits beyond tax refunds



ASSISTING WITH A NEW CARD ENROLLMENT

- All CSVs will have their own login
 - Invite to verify account and set a password will come before tax season
 - Will need to receive an authentication code by text message to log in
- Enrollments are fast and straightforward
- Card enrollment requirements and card features are the same as previous years

CFR FOCUS CARD ENROLLMENT

Enrollment Demonstration!

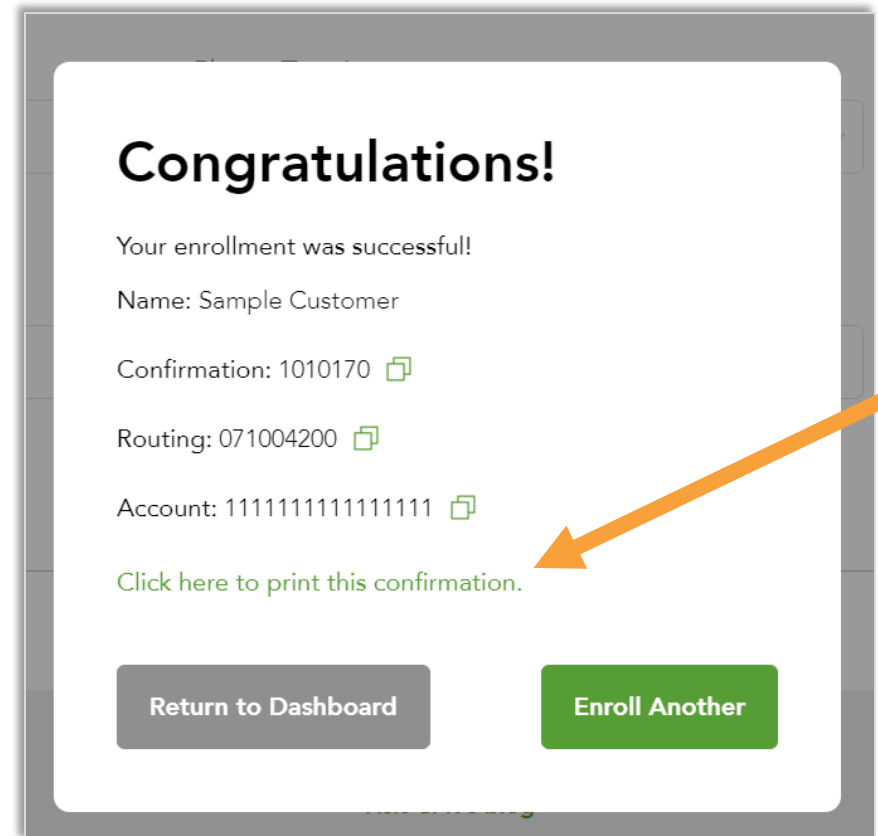


Want to follow along?

Go to the CFR card training portal. Get the website, username, and password on page 27 in the CSV manual.

PRINT THE CFR FOCUS CARD CONFIRMATION

- Preparer or reviewer need the new account information to enter it on the tax return
- Customer keeps this as a record of their new routing and account number



PREVIOUS YEAR CFR FOCUS CARD

- Can use same card year to year or open a new card
- Routing & account numbers for an old account may be on the previous year tax return
- Replacement cards can be ordered by calling the US Bank prepaid card customer service
- CSVs can look up an account number in the enrollment portal



FAIR:

Financial Access in Reach

FAIR BANKING OVERVIEW

- Partnership between P+P and Sunrise Banks
- Offer a safe, affordable, and accessible banking option offered by trusted community partners
- Focus on people who have been marginalized by traditional banking
- Accounts are available to people regardless of banking history (with the exception of bank fraud)

WHO'S A GOOD FIT FOR FAIR BANKING?



FAIR checking and savings accounts ARE a good fit for someone who...

- Has an imperfect banking history and gets turned away by other banks
- Has an account but is paying high and unpredictable fees, like overdraft penalties
- Is comfortable banking online and/or using a mobile app
- Has a smartphone with a data plan or secure internet access
- Gets paid via check or direct deposit
- Doesn't rely on cash



FAIR checking and savings accounts ARE NOT a good fit if someone...

- Has a history of actual bank fraud
- Has no smartphone with a data plan or internet access
- Doesn't feel comfortable with banking online/mobile
- Doesn't have access to direct deposit for their income
- Prefers operating in cash

THE FAIR PRODUCTS



**Check out
a checking
account made
for you.**

No overdraft fees.
No monthly minimum
balance.

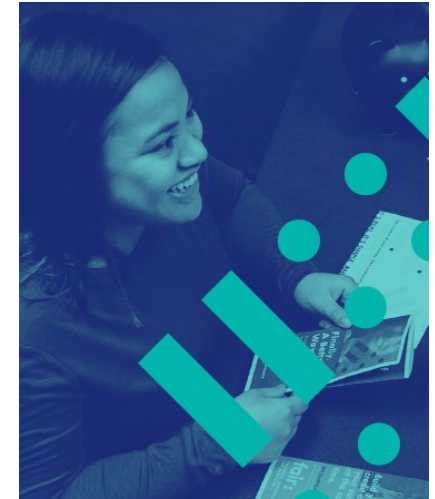
fair:
FINANCIAL OPPORTUNITY
FOR EVERYONE



**Discover a
smart savings
solution.**

Build more than just
your account balance.
Build a better tomorrow.

fair:
FINANCIAL OPPORTUNITY
FOR EVERYONE



**Work on
building your
credit score
while you build
your savings.**

A new way to build for
the future.

fair:
FINANCIAL OPPORTUNITY
FOR EVERYONE

THE FAIR PRODUCTS CONT.



A FAIR checking account gives you more control of your money.

- Open an account with as little as \$25
- A \$3 monthly fee
- No account overdraft fees
- No monthly minimum balance requirement
- Available regardless of banking history*
- Mastercard® debit card included with account
- FDIC insured**
- No transaction fees at 8 area Sunrise Banks ATMs
- No fee for receiving cash back at merchants that have agreed to provide cash back with a PIN purchase

For more info:
www.fairfinancial.org

* Prior bank account fraud activity is excluded.
** FDIC insured up to \$250,000 per depositor.

Sunrise Banks N.A., Member FDIC

A FAIR savings account can help you save for emergencies and the future, at your pace.

- Open an account with as little as \$25
- No monthly minimum balance requirement*
- No monthly service fees*
- Earn monthly interest
- FDIC insured**
- Manage your account with online and mobile banking

For more info:
www.fairfinancial.org

* Please consult our service fee schedule for a detailed listing of all bank fees for this account at fairfinancial.org/faq
** FDIC insured up to \$250,000 per depositor

Sunrise Banks N.A., Member FDIC

FAIR Credit Builder meets you where you are, and can help you on the path to financial opportunity.

No credit score requirement to get started.



After approval, we lend you \$500 and place the money in a secured Certificate of Deposit (CD) account.*



Each month for 18 months, you pay \$31.19 towards the loan, which includes an APR of 15%.** We report your monthly payments to all major credit bureaus, and you build your credit history.***



At the end of the 18-month term, when you've made all your payments, the \$500 CD is yours minus interest and fees.

* All loans are subject to credit approval.
** A \$500 FAIR Credit Builder account paid 18 times over 18 months would have a monthly payment of \$31.19, finance charge of \$61.42 and an Annual Percentage Rate (APR) of 14.98%.
*** Results not guaranteed. Improvement in your credit score is dependent on your specific situation and financial behavior.

Sunrise Banks N.A., Member FDIC

FAIR CREDIT BUILDER

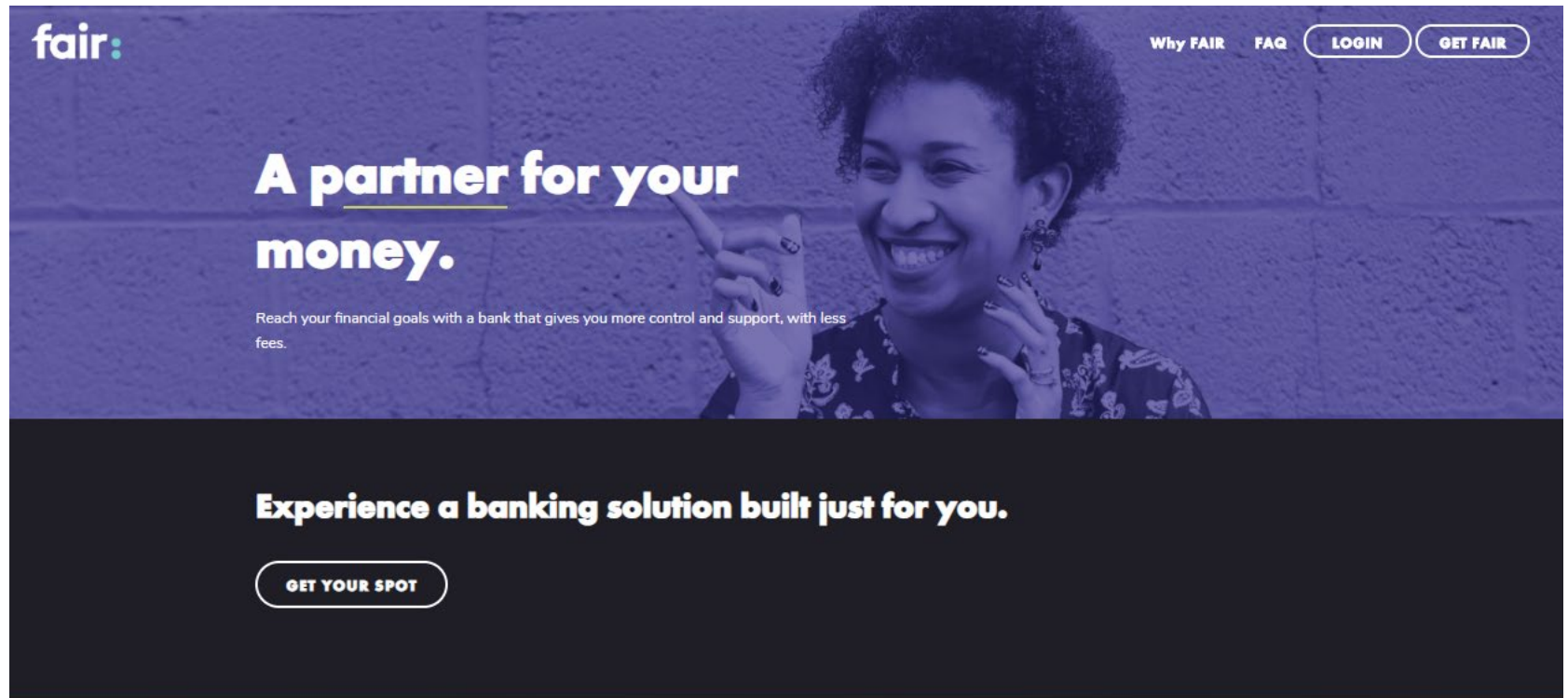
- Designed to help build credit by reporting regular payments to all three major credit bureaus
- Customer takes out a loan for \$500, but does not receive the money up front
- Money is locked into a Certificate of Deposit (CD)
- Customer pays around \$31 each month toward the loan
- At the end of the loan, customer gets the \$500 plus any interest the CD has earned

FAIR ACCOUNT REFERRALS

- Accounts for tax refund deposits:
 - Discuss account details
 - Review enrollment process with the customer
 - Schedule a priority FAIR enrollment appointment
 - Talk to your manager about holding the tax return
 - Include notes about holding the return on the log and online tracker
- Accounts for future use:
 - Discuss basic account details with the customer
 - Track like a regular referral on the log and online tracker

FAIR RESOURCES

fairfinancial.org



The screenshot shows the fair: website homepage. At the top left is the 'fair:' logo. To the right are navigation links: 'Why FAIR', 'FAQ', 'LOGIN', and 'GET FAIR'. The main headline reads 'A partner for your money.' with 'partner' underlined. Below this is a sub-headline: 'Reach your financial goals with a bank that gives you more control and support, with less fees.' The background features a smiling woman with curly hair. At the bottom, a dark blue banner contains the text 'Experience a banking solution built just for you.' and a 'GET YOUR SPOT' button.

fair:

Why FAIR FAQ LOGIN GET FAIR

A partner for your money.

Reach your financial goals with a bank that gives you more control and support, with less fees.

Experience a banking solution built just for you.

GET YOUR SPOT

PREPARE + PROSPER

CSV ROLE WITH DIRECT DEPOSIT

- Encourage customers to use direct deposit
 - Use existing accounts
 - Share new account options
- Make sure there is documentation of routing and account numbers
 - A printout or account card
 - Written on the P+P Tax Intake form
 - Help someone access online banking
- Help determine and document how a refund will be split

Paper Checks:
Some people want
or need to get a
refund check.
That's OK!

BREAK TIME!



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TAX TIME SAVINGS + SPLIT REFUNDS

PREPARE + PROSPER



REFUNDS BOOST EMERGENCY SAVINGS

- People tend to increase their savings when they receive large influxes of cash
 - Tax refunds
 - Bonus at work
 - Inheritance
- Tax refunds may help (re)build savings
 - Prepare for an emergency
 - Prevent debt by having a savings cushion
 - Boost financial confidence



SPLITTING A REFUND

- Uses the “money moment” of tax time to establish or boost savings
- Allows people to directly deposit a federal refund into multiple accounts or buy U.S. savings bonds
- Minnesota refunds cannot be split



SAVER PIGS

- Simple and visible way to celebrate saving and savers
- Customers write what they are saving for on a Saver Pig
- Hang the pigs up on the savings board



SAVE + WIN!

- **Save + Win** is a savings contest run by P+P
- Offers extra incentive to save or split a refund
- Ways to save:
 - Put a full tax refund into a savings account
 - Split a federal tax refund to put some in savings
 - Buy a U.S. savings bond
 - Save a Minnesota renter's or homeowner's refund

HOW SAVE + WIN WORKS

- **SAVE** \$50 or more into a savings account or buy a U.S. Savings Bond
- **ENTER** the contest by signing the Boost Your Money form
 - Enter the customer's details in the online tracker to complete the entry
- **WIN** one of the weekly \$100 prizes
 - Customers stay in the contest until they win or until the contest ends
 - P+P admin staff will call winners to notify them

U.S. SAVINGS BONDS

- Long term, low risk investment
- Amounts range from \$50 to \$5,000
- Interest earning for up to 30 years
- Can purchase up to three bonds
- Makes great gifts for children's educations
- Paper bonds can only be purchased with a tax refund



CSV ROLE WITH SAVINGS BONDS

- Discuss bond details with customer using the U.S. Savings Bond handout
- Use the bond section of the P+P Tax Intake sheet to plan amounts and who bonds are for
- Get bond details to the preparer to enter in TaxSlayer
- Confirm entry in the Save + Win contest



REFERRALS TO FINANCIAL PARTNERS

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WHAT'S THE DIFFERENCE?

FINANCIAL COUNSELING

- Focused on addressing a specific financial need
- Credit card debt, student loan debt, or homebuyer support
- Brief contact, limited follow-up

FINANCIAL PLANNING

- Focused on long-term financial goals
- Investments, trusts, insurance, or retirement
- Typically ongoing, but our referrals are one-time

FINANCIAL COACHING

- Focused on making behavior change
- Saving, spending, debt, or credit
- Long-term commitment; regular sessions; check-ins

MONEY MENTORS FINANCIAL COACHING

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MONEY MENTORS

- Coaching is future focused -- participants identify and work toward financial goals
 - Participant is the driver's seat
 - Coach is a nonjudgmental accountability partner
- Ongoing 1:1 meetings with a coach
 - Virtual, by phone, or in-person
 - Meet for at least 6 months and up to two years
- Monthly virtual peer sessions
 - Centered on a specific financial topic
 - Allows for peer sharing



MONEY MENTORS: FINANCIAL HEALTH CHALLENGE

- Promote financial spring cleaning with the Money Mentors Financial Health Challenge
- Eight weeks in March and April
 - New financial health task each week
 - Sign-up will be open in January through April
 - Customers can join anytime before or during the challenge
- CSVs add Financial Health Challenge flyer to all Money Mentors brochures given out
 - Customers are not required to do the challenge to sign up to work with a coach
 - Customers do not need to commit to working with a coach long-term to do the challenge
- **TO SIGN UP:** fill out the Money Mentors interest form and mark the box to be entered in the Financial Health Challenge



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MONEY Mentors

FINANCIAL HEALTH CHALLENGE

Spring clean your finances! Tackle a different financial task each week for **8 weeks** with support and **prize incentives** to keep you going.

Open to anyone, this challenge is designed to support you in making strides in your financial life, wherever you are on your journey. **Join anytime before April 19th.**

Submit a Money Mentors interest form by scanning the QR code or going to <http://tinyurl.com/MoneyMentorsInterestForm> to unlock access to the Financial Health Challenge. **Be sure to check the box 'Sign me up for the Financial Health Challenge.'** You can participate in the challenge whether or not you end up participating in Money Mentors financial coaching.

Already a Money Mentors participant? Email moneymentors@prepareandprosper.org with the subject line: 'Sign me up for the challenge' at any time to get signed up.

<https://prepareandprosper.org/money-mentors>

WHO IS A GOOD FIT FOR COACHING?



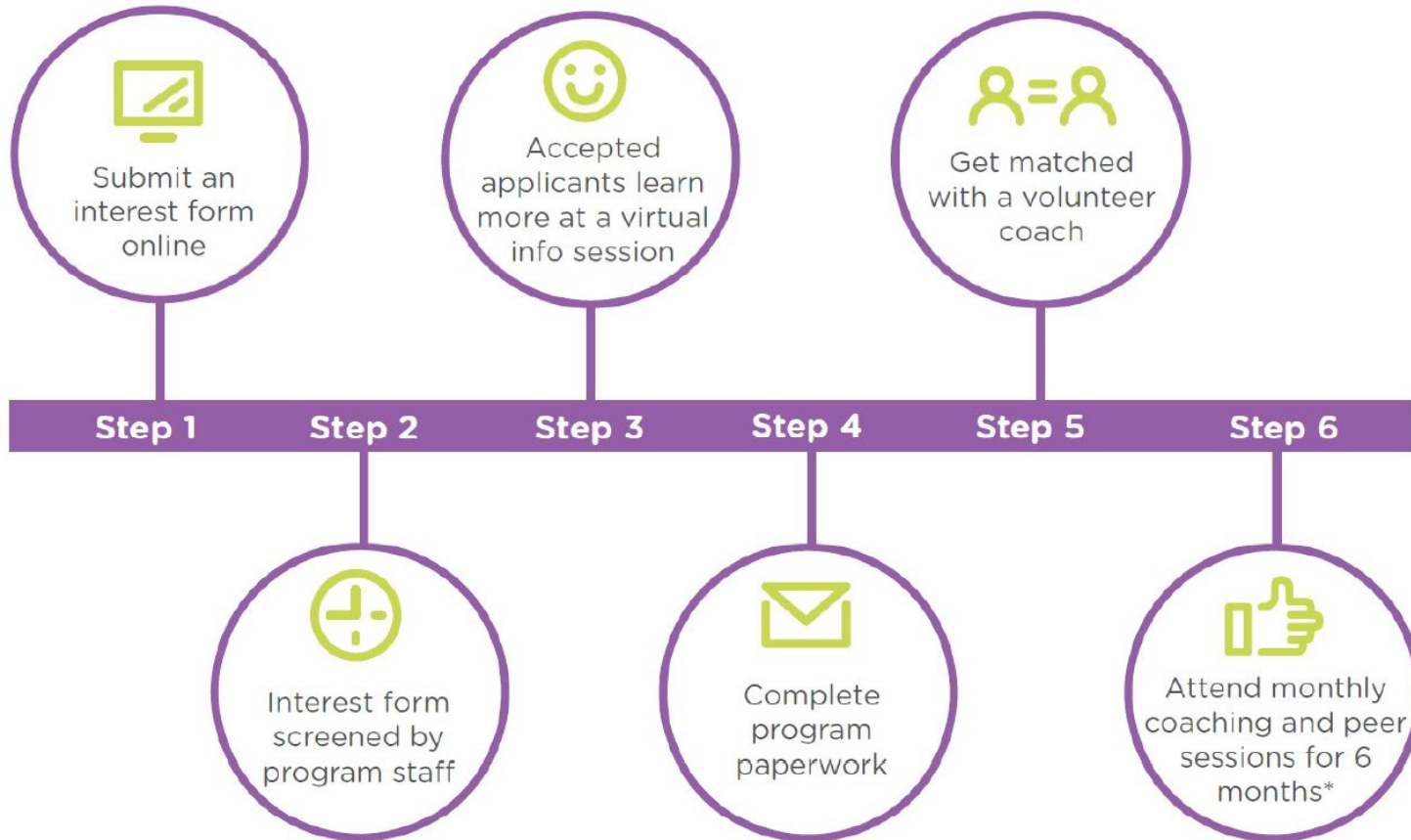
This program is a good fit for someone who...

- Is highly motivated and ready to make changes in their financial life
- Is ready to set tangible financial goals and take steps to reach them
- Has reliable income that is enough to cover basic expenses (housing, food, transportation, etc.)
- Will consistently attend monthly sessions and communicate with their coach
- Is comfortable discussing financial topics in a group setting

This program is not a good fit if someone...

- Is experiencing a financial crisis (bankruptcy, foreclosure, eviction, medical issues)
- Has a rep payee or is otherwise unable to make decisions about their spending
- Is looking for a quick solution to financial problems or just wants financial education
- Has no income or not enough to cover basic expenses
- Cannot regularly keep appointments with their coach

PARTICIPANT JOURNEY



CONNECTION TO MONEY MENTORS

Option 1:

Customers can fill out the interest form onsite using the link or QR code on the Money Mentors brochure

Option 2:

Money Mentors staff can reach out later to share more details about the program details and the interest form

Customer signs the Boost Your Money form. You provide a brochure, write the referral on your log, and enter the referral in the online tracker.

LSS FINANCIAL COUNSELING

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LSS FINANCIAL COUNSELING


- Counseling focuses on help with a specific financial issue
- Free one-time meetings via phone or online
 - No income limitations on service
 - Services are available statewide
 - Multi-lingual: English, Hmong, Spanish
- Provide eligible customers with counseling handout and track the referral
 - P+P admin staff will share contact information
 - LSS staff will reach out to the customer

LSS FINANCIAL COUNSELING TOPICS


- Credit card debt management
- Student loan debt
- Homeownership counseling
- Credit improvement

CONNECTION TO LSS FINANCIAL COUNSELING

- Customer signs the Boost Your Money form
- You provide the Financial Counseling customer handout
- You track the referral on your log
- You enter the referral in the online tracker

 **FINANCIAL COUNSELING**

What is financial counseling?
 Financial counseling is non-judgmental guided support for people who want to work on achieving financial wellness. Certified financial counselors can help guide and empower people's strengths and address barriers they face to achieve stability, build assets, and reach financial goals. We partner with Lutheran Social Services (LSS) to refer people to their services.

 LSS Financial Counseling
 988-577-2227
www.lssmn.org/debt

Credit Card Debt Solutions
What a Debt Management Plan can do for you:

- One convenient monthly payment
- On-time, faster repayment improves credit scores
- Debt paid in full, but faster and with less interest
- Coaching and tools to support your success

Successful Homebuying
Home ownership counseling sets you up for long term success by:

- Helping you assess your financial situation
- Addressing barriers, such as credit, debt, or student loans
- Determining if you are ready to buy and help you calculate what you can afford
- Sharing information on current mortgage loan programs
- Connecting you to down payment and closing cost assistance programs
- Helping you achieve your goals based on your specific needs

Student Loan Repayment Counseling

- Explore available repayment options for all student loans and potential solutions
- Determine an individual borrower's eligibility for federal options
- Establish a budget to cover monthly expenses, including student loan payments
- Attempt to contact private lenders to determine possible repayment solutions
- Review your credit report and help you understand it
- Help student loan borrowers come up with a plan to avoid default and the related consequences

Appointments are free and confidential. Multiple locations across Minnesota for in-person appointments as well as convenient phone or Teams options are available.

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financial@prepareandprosper.org
 651-287-0187
 prepareandprosper.org

FINANCIAL PLANNING

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P+P VOLUNTEER FINANCIAL PLANNERS

- Planning assistance and advice about complex, long-term financial issues
- Referrals go to P+P volunteers who are CFPs
- One-time meetings on a financial planning issue
 - Virtual or by phone
 - 30-60 minutes



FINANCIAL PLANNING TOPICS

- Retirement accounts
- Life Insurance
- Education savings
- Inheritance
- Investing

Review your manual when making financial planning referrals. Some common topics are not a good fit!



IMPORTANT REFERRAL TIPS: VOLUNTEER FINANCIAL PLANNERS

- Take notes about the specific topic the customer wants to discuss with a planner
 - Use the Boost Your Money form to take notes
 - Transfer your notes into the Financial Services Tracking Form
- Ensure that the customer wants a planner to reach out within the next few weeks
 - Last year, customers often did not expect a call or email from a planner after the tax clinic
 - Remember to share the “Next Steps” so customers know how the referral will be completed
- If a customer is interested but not ready for a planner to contact them now:
 - Share the Financial Planning handout
 - Customers can request a meeting later

CONNECTION TO VOLUNTEER FINANCIAL PLANNERS

FINANCIAL PLANNING

What is Financial Planning?

Financial planners are trained to help people plan for more complex, long-term financial issues such as retirement, life insurance, estate planning, and investments.

All volunteers are Certified Financial Planner™ professionals, which means they have met high training and experience requirements and abide by the CFP® code of ethics and standards of conduct. Volunteer financial planners are not allowed to sell products or take on P+P customers as clients.

There is no charge, no commitment, no pressure - just unbiased financial advice.

How can a financial planner help?

A volunteer financial planner is a financial expert who can meet with you over the phone or Zoom for a one-time consultation on any of the following topics.

- I am nearing retirement and need help figuring out distribution options.
- I need help developing a retirement savings plans.
- I want to determine appropriate life insurance policies.
- I have inherited assets and I'm not sure how to manage them.
- I want to talk to someone about a 529 College Savings plan.

*Volunteer financial planners are NOT able to give advice about specific investments.

How can I connect with a financial planner?

Option 1: If you're ready to sign up today you can do so at the tax clinic. Let your Customer Service Volunteer know and they'll complete the referral for you.

Option 2: If you decide to sign up at a future date, you can scan the code to complete a short referral form OR visit:

<https://prepareandprosper.org/fin-continuum-of-care/> or  

After signing up, your name and contact info will be sent to a Volunteer Financial Planner. Look for a call and/or email from a Prepare + Prosper Volunteer Financial Planner asking to schedule a consultation with you over the phone or Zoom.

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financial@prepareandprosper.org
651-287-0187
prepareandprosper.org

- Customer signs the Boost Your Money form
- You provide the Financial Planning handout
- You take notes on the Boost Your Money form about the specific topics a customer wants to discuss
- You track the referral on your log
- You enter the referral in the online tracker – **include your notes!!**
 - P+P admin staff finalize the referral
 - Planners will reach out via email or phone within 2-3 weeks

EXODUS LENDING

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EXODUS
LENDING

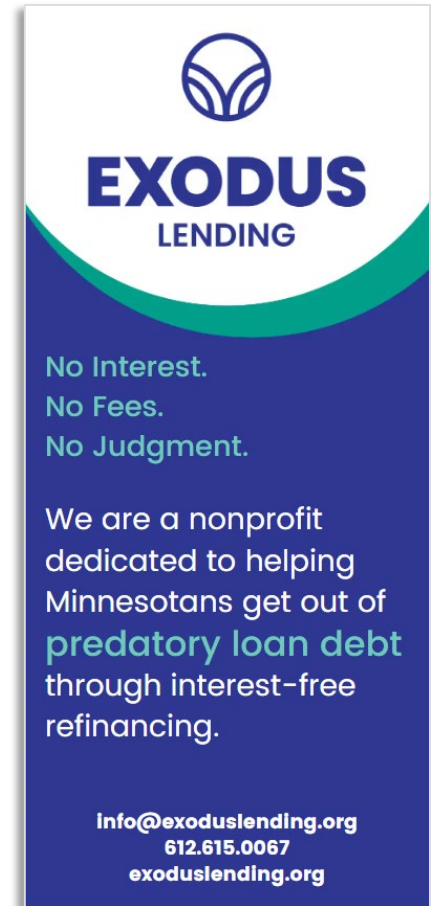
ABOUT EXODUS LENDING

- Organization helping refinance and pay off predatory loans
 - Pays off up to \$1,500 of high interest loans
 - Refinances loans to a 0% interest rate loan
 - Borrower repays Exodus over 12-24 months

Exodus Lending will assist with predatory loans that have interest rates over 36%, including payday, pawn, title, or online installment loans.

CONNECTION TO EXODUS LENDING

- Customer signs the Boost Your Money form
- You provide the Exodus Lending flyer
- You and the customer fill out a short online referral form (if time permits)
- You track the referral on your log
- You enter the referral in the online tracker
 - Exodus staff will reach out to the customer within a week



COLLEGEBOUND SAINT PAUL

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CollegeBound +
SAINT PAUL



ABOUT COLLEGEBOUND

- Program to build higher education savings for families in the city of St. Paul
- New college savings accounts are opened for qualifying babies
 - Child must be born after 1/1/2020 and be a St. Paul resident by age 6
- City of St. Paul provides \$50 for each child
- Families can contribute additional funds

CONNECTING FAMILIES TO FINANCIAL HEALTH BONUSES

- Families qualify for an annual bonus deposit for a financial health activity
- Getting free tax preparation qualifies for the \$50 bonus
- Provide CollegeBound families with a bonus card
 - Customer fills it out and submits the information
- Track the interaction on the log and in the online tracker

Claim your Financial Health Bonus!

Received this card from an organization or partner of CollegeBound? Fill out the info to the right and return it to The City of Saint Paul and we'll process your \$50 bonus.

CollegeBound
SAINT PAUL
Pathways for Every Child, Family and Future.

Child's Name _____

Child ID # or DOB _____

Activity _____

Date _____

Parent Email or Phone _____

Financial Health Bonuses are awarded once per year for activities that promotes the financial health of your family; some possibilities could include meeting with a financial counselor, reviewing your credit report, attending a financial education class, or enrolling in a bank account. Questions? collegebound@ci.stpaul.mn.us or 651-266-8829

CONNECTING NEW ELIGIBLE FAMILIES TO COLLEGEBOUND

- Get eligible families signed up for the program
 - Not enrolled but have an eligible child
 - Unsure if they are enrolled and have an eligible child
 - Expecting a child soon
- Provide a program flyer and bonuses handout
- Fill out the quick online enrollment form with the customer (if time permits)
 - For families that will be eligible soon, use the pre-registration form
- Track the interaction on the log and in the online tracker

WRAP UP

PREPARE + PROSPER



REMEMBER YOUR RESOURCES!



Boost Your Money Form Checklist

- **Initial details:** I shared details of the referral or service and ensured the customer is eligible.
- **Resources:** I provided a handout or brochure for each referral/service requested.
- **Consents:** The customer signed the consent to share data for each referral/service requested.
- **Financial Services Log:** I logged the customer information on paper financial services log.
- **Tracking form:** I recorded the customer's name and the referrals/services requested in the online financial services tracking form www.tinyurl.com/fstracker2024
- **Next steps:** I explained next steps for each referral/service requested.

NEXT STEPS

- Finish your Volunteer Standards of Conduct test
 - Resources on the Volunteer Training Site:
prepareandprosper.moodlecloud.com
- Review additional resources on the Volunteer Training Site
- Attend CSV training part 3
 - Part 3 covers the credit reports and the checkout process



THANK YOU!

PREPARE + PROSPER

