



Training Purpose

Providing effective, safe, and meaningful financial coaching for people experiencing economic stress requires a special approach that incorporates the tools of basic finance and economics into an understanding of a person's psychological, emotional, social and cultural relationship with money. We know that people experiencing trauma often have financial stress as a result. Money can also be a major stressor in people's lives, sometimes causing trauma.

Money is tied to just about everything in our lives, and we often perceive our financial and economic condition through an emotional lens. So economic trauma can be connected to a web of multiple other domains of our lives, expanding the trauma. If we want to provide meaningful services to people in economic stress, we can't just look at the financial or economic pieces; we have to look at the interconnected impacts across a person's life, or we run the risk of causing more trauma.

Traumatic responses often involve difficulty with executive functions like problem-solving, decision-making, memory, impulse control and focusing. Thus, the tasks we expect clients to complete in a financial coaching setting can seem overwhelming. Understanding the intersections between money and trauma and help financial coaches deliver services with sensitivity to the factors that may impact an individual's financial journey and decision-making.

Part 1: Introduction to Trauma Informed Care

July 18, 2024 | 9:30 – 11:00 am

Overview

Build your knowledge and skills necessary to provide compassionate and effective support to clients receiving financial coaching services and who may be experiencing or have a history of trauma. The training will aim to meet the following key learning objectives:

- Understanding Trauma
- Trauma-Informed Principles
- Trauma-Sensitive Communication Techniques
- De-Escalation Techniques and Skill Acquisition
- Crisis Response Plans

About the Presenter: *Sheri Gibson, PhD* | drsherigibson.com

Dr. Gibson received her Ph.D. in Clinical Psychology with an emphasis in Geropsychology from the University of Colorado, Colorado Springs (UCCS). She is an instructor and clinical supervisor for the Psychology Department at UCCS and a faculty affiliate with the UCCS Gerontology Center. Dr. Gibson serves on the editorial board for the Journal of Elder Abuse & Neglect, is a member of the Research Committee for the National Adult Protective Services Association (NAPSA), and a founding member of the Pikes Peak Elder Justice Center. In addition to being an advocate for elder justice, Dr. Gibson has a private psychotherapy and consultation practice, which includes provision of capacity evaluations, expert testimony, consultation, and training.



Part 2: Trauma-Informed Practices for Financial Coaching

July 25, 2024 | 9:30 – 11:00 am

Overview

This workshop will help you to recognize and understand the dynamic effects of economic trauma and abuse, and it will provide you with suggestions for how you can help your clients stabilize and thrive. This training will help you to:

- Recognize several key effects of trauma on financial behaviors and how they impact a person's ability to stabilize and improve their financial health.
- Understand how to apply several trauma-informed methods for working with people who have experienced economic trauma or abuse.
- Identify when trauma reactions interfere with a person's ability to benefit from financial coaching and a referral to therapy would be helpful.
- Recognize the importance of boundaries and self-care when working with people experiencing trauma and identify two or more techniques for enhancing your skills.

About the Presenter: *Joanne McLain, Financial Health Institute* | financialhealthinstitute.org

Joanne McLain facilitates stories through writing, art, curriculum design, coaching and counseling. She is the Vice President of Innovation and Curriculum at the Financial Health Institute, which develops, delivers and promotes Person-Centered Financial Education for people experiencing economic stress and the organizations that serve them so that everyone can improve their financial health.

Her experience includes six years with a rural Department of Human Services, where she was the Deputy Director and managed family programs including services for families involved in child welfare, adult protection, and all benefits programs. She has been a mental health and substance abuse counselor in a variety of settings, including community mental health centers, private practice, nursing homes, a volunteer fire department, emergency rooms, and inpatient units. Joanne has a Master's Degree in Psychology, is a Licensed Professional Counselor, a Licensed Addictions Counselor and an Accredited Financial Counselor. She also earned a Ph.D. in Educational Leadership and Innovation from the University of Colorado Denver.