Financial Wellbeing Conversations for Counsellors Training Course

5 – 9 July 2027
San Diego

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Ref: 1192_188051 **Date:** 5 – 9 July 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Financial wellbeing conversations for counsellors is a one-week course for counselling and client-support practitioners, who leave with a Financial Wellbeing Conversation and Referral Pack. The course addresses money-related stress through nonjudgmental money conversations, financial wellbeing screening, basic financial capability tools, ethical referral pathways, and a client financial action plan. Agile Leaders Training Center develops financial wellbeing conversation practice.

Who Should Attend

- Teams responsible for counselling clients through personal and workplace pressures
- Teams responsible for social support, case coordination, and safeguarding
- Teams responsible for employee assistance and workforce wellbeing
- Teams responsible for community advice and access to support services
- Teams responsible for client intake, assessment, and referral

The course assumes participants already conduct confidential client conversations, and it leaves out regulated financial advice, investment recommendations, debt restructuring, and clinical diagnosis.

Departments and Industries

The course supports departments and industries where money concerns affect client wellbeing, service access, or workplace support.

- Human resources, employee assistance, and occupational wellbeing departments
- Social services, community development, and nonprofit organizations
- Healthcare, counselling, and behavioral support services
- Education, student support, and career guidance services
- Housing, utilities, and public-facing customer support teams

Learning Objectives

By the end of this course, participants will be able to:

- Analyze financial stress signals within client conversations
- Apply nonjudgmental questioning and reflective listening methods
- Use a structured financial wellbeing screening process
- Build ethical boundaries and informed referral pathways
- Prioritize practical client actions without giving financial advice
- Evaluate progress through documented wellbeing indicators

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Course Agenda

Day 1: Financial Wellbeing and Money Stress

- Financial Wellbeing Dimensions Map
- Money Stress Recognition Indicator Set
- Financial Shock and Resilience Scenario Grid
- Client Context and Vulnerability Mapping Tool
- Scope of Support Boundary Statement

Day 2: Safe Money Conversations

- Nonjudgmental Money Conversation Framework
- Open-Question and Reflective Listening Guide
- Emotional Response and De-escalation Map
- Trauma-Aware Conversation Preparation Checklist
- Consent, Privacy, and Documentation Protocol

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Day 3: Screening and Financial Capability

- Financial Wellbeing Screening Questionnaire
- Income, Commitments, and Cash-Flow Snapshot
- Priority Needs and Financial Pressure Matrix
- Financial Capability Strengths Assessment
- Client Readiness and Motivation Scale

Day 4: Boundaries, Referrals, and Action

- Advice-versus-Guidance Decision Test
- Conflict and Influence Risk Checklist
- Ethical Referral Pathway Map
- Warm Referral Conversation Script
- Client Financial Action Plan

Day 5: Integrated Conversation Practice

- Exercise: Recognize Money Stress in an Intake Case
- Exercise: Conduct a Nonjudgmental Money Conversation
- Exercise: Complete a Financial Wellbeing Screen
- Exercise: Select and Explain an Ethical Referral Route
- Capstone Exercise: Financial Wellbeing Conversation and Referral Pack

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Practical Exercises

The course uses suggested activities that connect financial awareness with safe client-support practice.

- Suggested activity: distinguish financial stress signals from assumptions in a healthcare intake case
- Suggested activity: practice reflective questions with an employee facing competing payment pressures
- Suggested activity: map referral options for a community-service client with urgent needs
- Suggested activity: document actions, boundaries, consent, and follow-up in a client record

FAQs

Who suits financial wellbeing conversations training, and what does it assume?

Counsellors, social workers, employee-assistance professionals, community advisers, and client-support practitioners suit the training. It assumes experience with confidential conversations and leaves regulated financial recommendations to appropriately qualified specialists.

How does financial wellbeing conversations training differ from personal finance training?

Financial wellbeing conversations training develops recognition, dialogue, screening, boundaries, referral, and support planning. Personal finance training focuses more directly on budgeting, saving, borrowing, and financial products for the individual learner.

What is financial wellbeing screening in counselling practice?

Financial wellbeing screening is a structured way to explore perceived control, resilience to shocks, progress toward goals, and freedom of choice while considering the client's context and emotional response.

How should counsellors respond to money-related stress?

Counsellors should listen without judgment, assess immediate wellbeing and safeguarding concerns, clarify their professional boundary, agree practical next steps, and offer an informed referral when specialist financial or clinical support is needed.

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What makes an ethical referral pathway for financial concerns?

An ethical referral pathway identifies suitable services, explains their role, gains client consent, avoids conflicts or product promotion, transfers only necessary information, and records follow-up responsibility.

Conclusion

Participants take back a Financial Wellbeing Conversation and Referral Pack containing screening questions, conversation guides, boundary tests, referral maps, action plans, and progress indicators. The pack changes improvised money discussions into a documented support process. It helps practitioners recognize financial distress, maintain role boundaries, and connect clients with appropriate assistance.