

Parish Family Financial Training Programs Catalog April 2017

This catalogue seeks to offer Faith Community groups a limited number of options for use of Financial Training Curriculum to educate their members in family budgeting and financial capability to be better stewards of the gifts God has entrusted to them.

1. Crown Financial Ministries Catholic Materials: MoneyLife Personal Finance Study is used by many faith- communities around the Country, especially in the Diocese of Orlando Florida. There individual programs and group use programs.

The MoneyLife Personal Finances study is a 10 sessions, step by step plan for eliminating financial stress. It uses a Money Life Indicator that helps the individual or group leader what key areas does the participant need to address.

The cost is \$39.95 for each participant packet. (Please note that there are progressive discounts for larger numbers of participant packets, beginning at a 5% discount for 20 ordered and up from there.) An online version is available at \$20 each, and is a 7 session program. Contact Richard Murphy for info 270.683.1545.

www.crown.org

2. Dave Ramsey's Financial Peace University. This program has been used in a number of different parishes and over an extended period of time. It is a nine week program and it is designed to be used in group sessions. The program materials cost \$93 for a member kit that includes: a book, and envelope system for paying required bills, CD, a financial snapshot form and a workbook. There is an online version that cost \$129 that allows the user to get started immediately, and learn at one's own pace while watching lessons any time one chooses. These lessons can be viewed on any device. Contact Chip Pride for info at (270) 686-1776.

<https://www.daveramsey.com/fpu/>

3. Financial Fitness: Your Guide to Strengthening Financial Security. This material was written by Sharon Laux and Suzanne Zemelman for the University of Missouri Extension office in 2004. These materials are on hand in the Office of Social Concerns for the Diocese of Owensboro. These materials can be checked out and have limited free copying.

(There is also a revised version called **Making Money Count**. To order the materials in hard copy the price is \$200 and by a single CD, the price is \$150.) They are available at

<http://extension.missouri.edu/hes/financial/makingmoneycount.htm>. The Financial

Fitness material consists of a user's manual and an instructor's manual with CD that contains the PowerPoint slides for the presentations. There are five lessons covering: making a financial game plan, taxes, keeping records and contracts, utilizing credit, understanding financial services, savings and investing, and insurance. Each lesson has a PowerPoint presentation, instructor's notes, participant notebook and additional resources. Contact Richard Murphy for info 270.683.1545.

4. Money Smart. This is a financial education program put together by the Federal Deposit Insurance Corporation (FDIC.) Money Smart is a comprehensive financial educational curriculum with 11 modules designed to help low and moderate income individuals outside the financial mainstream enhance their financial skills and create positive banking relationships. Money Smart has reached over 3 million consumers since 2001.

Money Smart is available free of charge in several versions and in several languages. It can be used individually or with groups. Contact Amanda Payne for info at (270) 686-1776.

<https://www.fdic.gov/consumers/consumer/moneysmart/>

Special Note: As part of the Strategic Plan for the Diocese, the Family Budget and Finances Strategic Committee is developing a modified version of its own of 4 weeks in length with a faith based element to it for Parish use. Amanda Payne is still the contact person for this selection.

5. Seven Steps to Becoming Financially Free. This program was written and developed by Catholic author, Phil Lenaham, president of Veritas Financial Ministries. The program uses a book and workbook for possible group experience. The seven steps cover: learning to be a steward of Providence, assessing where you are and developing a plan, establishing an emergency savings, establishing a rainy day fund or six months of expenses saved, reviewing insurance and estate planning, and finally saving and investing with a purpose.

The cost involved here are \$29.95 for a single participant set, leaders guide for \$19.95 and a leaders kit is \$99.95. The online version of the program is \$99. Contact Richard Murphy for info 270.683.1545.

<https://www.osv.com/Shop/Product?ProductCode=T252>

6. Your Money, Your Goals. This toolkit was developed by the Consumer Financial Protection Bureau (CFPB.) It is free and is available in English or Spanish. The toolkit allows for a facilitator to test the participant's knowledge and

need for particular topics. Where the need is greatest the program can begin. There are 14 modules to help the participant grow in knowledge of financial capability. Participants will be able to learn how to make a spending plan that can help them reach their goals, how to order and fix a credit report, how to avoid tricks and traps as they choose financial products, how to make decisions about repaying debt and taking on new debt, keeping track of their income and bills, how to decide if they need a checking account, and the type they may need to open. Contact Richard Murphy for info 270.683.1545.

<https://www.consumerfinance.gov/your-money-your-goals/>