

Certified Financial Counselor for Children, CFCFC

In recent years, children money management has become a specific field in education. There are many different courses available in children money management, however, there are no sets of common guidance for such courses, which, course contents may vary significantly in different courses or even inappropriate to children. This course is specifically for individuals who would like to become a Certified Financial Counselor. Throughout the course, trainee will be taught how the use of concepts in money management, investment, and psychology & counseling of real cases together with games to assist and increase children's knowledge in money management as well as personal saving and investment. In addition, children will be introduced to the necessary steps and the considerations needed in personal and family money management.

Target: Financial planners or related professionals

Course Objectives:

After successfully completed the course, trainees will be qualified to assist children:

- to understand the positive manner in money management
- in whole-person development
- design a program to suit the needs of children in money management
- evaluate and analyze the behaviors of children and make counseling and improvement

- **Language:**

The course will be taught in Cantonese with the use of English. Course materials, assessments and examinations will be mainly in Chinese.

- **Admission Criteria:**

Applicants must at least complete HKCEE, or equivalent qualifications

Course Duration: 2 days

Course Contents:

1. Basic Principals about money management for kids

- '3C' Money Management – Concept, Cash flow and Control and children's management
- Children Education and money management
- Personal and family financial recording and budgeting
- Cost-effective spending and advertising
- 'WESS' & 'SSID' management
- DOME goal setting toolbox

2. FQ Secrets

- NEO test and analysis
- Transactional analysis
- Behavior observation and improvement

3. Child development psychology and relationship with FQ

- Basic principles of development psychology
- Cognition
- Sensation and perception
- Memory
- Language development
- Emotion

4. Enhancement of productivity

- Case studies
- Role play
- Creative marketing strategies

Certificate

- Those who complete the online course may apply the Certified Financial Counselor for Children issued by York University. Students will be required to submit an online assignment with application fees.