FAIM Program

Tracking Form: Financial Management Training Hours

**FAIM Client Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**FAIM Coach**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Agency**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Requirement: Complete *12 hours* of training to include a course and 1:1 financial**  **counseling. The following topics must be addressed in the training:*** Budgeting to Create Savings
* Debt Reduction and Asset Building
* Building a Good Credit Rating
* Consumer Protection and Financial Institutions

**FAIM Client:** Submit this completed form or Training Completion Certificate to your FAIM coach.  All financial management (12) and asset-specific (10) training hours must be successfully  completed before you may access FAIM account funds. |

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| **Date and Number of Hours Completed:** | **Description of training / counseling:** What topics were discussed?How does it relate to obtaining your chosen asset?What are your next steps? | **Counselor Information:**Printed Name and Title, Phone, Email and Signature |
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**FAIM Client Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Date and Number of Hours Completed:** | **Description of training / counseling:** What topics were discussed?How does it relate to obtaining your chosen asset?What are your next steps? | **Counselor Information:**Printed Name and Title, Phone, Email and Signature |
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**If additional space is needed, please start another form.**

**FAIM Coach:** Keep this form in your local client file. Upon fulfilling 10 hours of asset-specific training, complete and submit Training Certificate to the FAIM Program Administrator to receive payment of Coaching Dollars.