

Financial Counselling

WITH JESSICA MOORHOUSE



WORKPLACE PROGRAMS



JESSICA@JESSICAMOORHOUSE.COM

What Is Financial Counselling?

Accredited Financial Counsellor Canada® certified designees (like myself) are specifically trained to help clients improve their financial literacy, learn more effective money management strategies, and most importantly identify and modify hindering financial behaviours. Personal finance isn't just about strategies and calculations. It's also about understanding why you have certain money behaviours and being able to identify patterns and control triggers. This combination of financial planning and counselling is something unique your employees would benefit from.

Accredited Financial Counsellor Canada® is a certification mark of the Association for Financial Counseling and Planning Education®, is licensed by the Ontario Association of Credit Counselling Services and endorsed by the Canadian Association of Credit Counselling Services. All AFCC® designees must adhere to the AFCPE® Standards of Practice and Code of Ethics, and are required to pay an annual certification fee and complete 30 Continuing Education Units of professional development every 2 years.

What Else Should I Know?

I am a fee-only financial counsellor, and thus do not sell financial products, do not manage any client's investment portfolios, and am not affiliated with or work for any company or financial institution. I also cannot give investment advice (only registered investment advisors or portfolio managers can do that), though I can offer investment education and resources. I also do not receive any commissions, incentives, or referral fees from third-parties, and cannot specifically recommend any products, but can educate and guide clients to make the best decisions for themselves.

Workshops

Full-Day Workshop

- 6-hour financial counselling workshop for employees at employer's office.
- Workshop can be customized to employer's wishes, though topics on budgeting, saving, spending, investing may be included.
- Printed worksheets, documents and resources will be provided to all employees.

Half-Day Workshop

- 3-hour financial counselling workshop for employees at employer's office.
- Workshop can be customized to employer's wishes, though topics on budgeting, saving, spending, investing may be included.
- Printed worksheets, documents and resources will be provided to all employees.

Lunch & Learn

- 1-hour financial counselling presentation for employees at employer's office.
- Presentation can be one on one of the following: *How to Budget Like a Pro*, *Demystifying Debt & Credit*, *What You Should Know Before Becoming a Homeowner*, or *How to Be a Savvy Investor*.

One-on-One Counselling

Full-Day In-House Counselling

- 6-hour financial counselling day at employer's office in which I would meet with employees one-on-one for 1 hour each (max. 6 employees per day) to help them with their financial struggles and priorities.

Half-Day In-House Counselling

- 3-hour financial counselling day at employer's office in which I would meet with employees one-on-one for 1 hour each (max. 3 employees per day) to help them with their financial struggles and priorities.

Virtual Counselling

- One-on-one 1 hour sessions with employees conducted online via Zoom.

What Clients Are Saying

"As a recent graduate facing student loans and a new job, Jessica's expertise was invaluable in helping me plan for my financial future. I would absolutely recommend her to anyone looking for expertise on managing debt, planning for retirement, and setting yourself up for financial success."

- Shannon Hazlett, Calgary, Alberta, Canada

"I highly recommend Jessica for financial counselling – it was one of the best decisions I've made in life. I was OK with my finances but I knew I need another pair of eyes (and with an excellent knowledge of financial management) to help me to plow through my challenges and to prepare for the future for short- and intermediate- goals. I always feel relieved and happy after each session with Jessica, leaving me with more confidence in my financial health and reaching our goals. I changed our approach to finances significantly and it made a difference in how we're tracking, budgeting, saving, investing and spending. She is positive and upbeat, never worry about being judged, she is there to support you. In addition, she is tech savvy, she makes her resources valuable and easy to use. Thank you Jessica for making a difference in our life!"

- Katie Kilmartin, Toronto, Ontario, Canada

"I'm so glad I made the decision to work with Jessica. I wanted more clarity on my finances, and to be able to put a structure in place to plan for the coming year. I got all that and more. I'm confident that our session together has provided me with invaluable information that I can take with me into the future for years to come. I highly recommend working with Jessica if you're looking for a financial plan and/or better understanding of your finances. I've already put some of what we worked on in action and I feel more on track. I also love her podcasts and a lot of her content, super inspiring! Thank you, Jessica!"

- Mary Wales, Toronto, Ontario, Canada