



BALANCE Financial Fitness Program presents:

# **BALANCE** FINANCIAL FITNESS TRAINING

BALANCE, the nation's only comprehensive financial education and counseling service developed specifically for credit unions, now offers train-the-trainer services. No one knows the needs of your members and employees better than you. This program can turn your trainers, marketers and business development staff into money management experts so you can instruct and inspire your members and staff when and how you want.

- Offering classes in your branches brings members through your doors
- Enhance staff training with the tools and information learned
- Cross-sell your products and services while educating members on how to best use them
- Meet your commitment to financial education for your members
- Provide education on-site at SEGs

During this 2-day course your trainers will learn to present our most popular financial education classes.

## **UPCOMING TRAINING PROGRAMS**

### **April 8-9, 2003 – El Segundo, CA:**

- Solving the Mystery of Credit Reports
- 10 Steps to Financial Success

### **May 1-2, 2003 – San Francisco, CA:**

- First Time Homebuyer
- Budgeting and Goal Setting

150 POST STREET  
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SAN FRANCISCO, CA 94108

800-808-4327

[WWW.BALANCEPRO.ORG](http://WWW.BALANCEPRO.ORG)

## Schedule

- **April 8 and 9, 2003:** “Ten Steps to Financial Success” and “Solving the Mystery of Credit Reports”

Location: Xerox Federal Credit Union, 2200 East Grand Avenue, El Segundo, CA 90245

- **May 1 and 2, 2003:** “First Time Homebuyer” and “Budgeting and Goal Setting”

Location: BALANCE Headquarters, 150 Post Street, 7th Floor, San Francisco, CA 94108

## Training Includes

- Presentation skills training
- Training for 2 workshops
- Videotape of each participant’s presentation
- Hands-on experience in presenting material
- Reduced fee for workshop licensing

## Licensing includes

- Power point presentation
- Trainer’s guide
- Unlimited telephone access to trainers for assistance
- Customizable educational materials on disk
- Rights to use workshops and materials for one year
- Periodic updates of materials

## Fees

- One attendee from your credit union – \$600
- Additional attendees – \$500
- One year licensing per workshop – \$300

## Contact

For more information or to enroll contact Jeannine Moore at **800-808-4327** Ext 124, or email [jmoore@balancepro.org](mailto:jmoore@balancepro.org).

Our education program has been widely recognized by not only our credit union partners, but by many employers nationwide. We’ve had the opportunity to create and provide educational services for such organizations as:

Adecco  
Adobe  
Andrews FCU  
Apple  
Argonne CU  
Arriba  
Cirrus Logic  
Consumers Cooperative CU  
Electronics for Imaging  
Ensign FCU  
Excite  
Federal Reserve Bank of SF  
Gensler  
Hiway FCU  
Hotwire  
Hyundai  
Inktomi  
Integrated Device Technology  
IR FCU  
Levi, Strauss & Co.  
McKesson  
Medical Centers CU  
MMC Technology  
Morrison & Foerster  
NASA  
Netflix  
Oral B  
Quintiles  
San Jose Mercury News  
San Mateo Credit Union  
Santa Clara County FCU  
Seattle Telco CU  
Sega  
Selco Credit Union  
Snap  
Spectria  
State Employees CU (NC)  
Summit CU  
TabProducts  
Telagy  
Tucoemas FCU  
Twin City Co-Ops FCU  
Twin County FCU  
United Services of America FCU  
University CU  
Vystar CU  
Washington State Employees CU  
Wells Fargo  
Xerox FCU  
Yahoo