Trends in Financial Counseling

Mark Lynch
Senior Program Manager
National Credit Union Foundation
Training Certified CU Financial Counselors

- Partnership with CUNA and Leagues
- Tutorial Webinars
- Training and proctored exams
- Focus on program development & impact measurement
Training Certified CU Financial Counselors

2165 New Counselors
at 523 Credit Unions
through 62 Programs
in 27 States
The Trends

Branch Managers, Lenders, Collectors

Increase in Interest

Part-time Counselors
The Challenges
The Challenges
The Challenges

Track and Measure Success
Some Developing Models

Hawaii First Federal Credit Union

BMI Federal Credit Union

American Heritage Federal Credit Union

We offer you the right financial solutions because you're family.