

Program One

Sample 3-Year Curriculum



Year One

- Familiarize yourself with The Ernst & Young Financial Planning Center® (EYFPC)
- Take your initial Financial Wellness Assessment
- Develop initial connection with your EY financial planner and establish your goals
- Access a relevant monthly EYFPC webinar and article
- Identify and meet regularly with your lay financial mentor
- Engage regularly with the Program Director and cohort members via social media
- Participate in regular program evaluations
- Receive a financial incentive for your progress

Year Two

- Regularly engage with The EY Financial Planning Center® (EYFPC)
- Take your Financial Wellness Assessment
- Continue connection with EY financial planner and review your goals
- Complete additional Financial Analysis with your EY financial planner regarding:
 - Retirement/asset allocation
 - Life insurance needs
 - Education funding
 - Estate planning
- Access a relevant monthly EYFPC webinar and article
- Continue to meet regularly with your lay financial mentor
- Engage regularly with the Program Director and cohort members via social media
- Brainstorm how you will engage your ministry setting in financial stewardship health
- Participate in regular program evaluations
- Receive second financial incentive for your progress

Year Three

- Regularly engage with The EY Financial Planning Center® (EYFPC)
- Take your Financial Wellness Assessment
- Continue connection with EY financial planner and review your goals
- Complete additional Financial Analysis with your EY financial planner regarding:
 - Retirement/asset allocation
 - Life insurance needs
 - Education funding
 - Estate planning
- Access a relevant monthly EYFPC webinar and article
- Continue to meet regularly with your lay financial mentor
- Engage regularly with the Program Director and cohort members via social media
- Successful engagement in ministry setting regarding healthy financial stewardship
- Participate in regular program evaluations
- Receive final financial incentive for your progress