

Engage, educate and empower



Provide the financial education, certified counseling and online tools consumers need to realize their goals and boost your reputation as an organization that supports the financial empowerment of the families you serve.

BALANCE is a national non-profit financial and housing education and counseling service. Since 1969, we've helped millions of individuals and families thrive. With our turnkey, white-label partnership approach, you can deliver world-class financial education and certified counseling—all under your own brand. We even provide support to make our partnership a success:

- **A partner relations team to help assess your needs and identify opportunities**
- **Marketing tools**
- **Monthly reports**
- **Periodic promotions**

Our Services

- **Financial Coaching** – Certified financial coaches work with clients via phone to address issues of debt, money management, student loans, payday lending and more.
- **Housing Counseling** – From home buying to foreclosure prevention our housing counselors can help. We're also certified to provide Reverse Mortgage counseling.
- **Credit Report Review** – Includes an analysis of the credit report and education and support on credit scores, correcting inaccuracies and preventing or overcoming identity theft.
- **Online Education** – E-Learning modules, instructional programs, new media resources, toolkits, calculators and articles—all integrated into a co-branded, customizable website.
- **Workshops & Webinars** – Live informative sessions led by BALANCE Certified Coaches with more than 50 topics available. Presentations are also available for licensing and can be conducted by your staff.
- **Training** – Money Coach Program is a specialized program designed to train staff to become expert personal finance coaches.

Youth Programs

- **Balanced Life™** – an interactive activity-based budgeting simulation for teens.
- **M3 Money Club®** for kids offers everything needed to capture the attention of today's young consumers including an interactive website, comics, quizzes, podcasts, kids' blog, puzzles, activities and more.
- **Elements of Money®** features financial education for teens with a customizable website serving as a hub, hosting contests, articles, 120+ podcast episodes and more.

For more information, contact Partner Relations at (800) 808-4327 or partner-relations@balancepro.org.