

Staff FAQ

Financial Literacy for Recovery | Quick answers for clinical staff and program leadership

Is this therapy or financial advice?

No. Sessions are financial education that complements your clinical team's work. I don't provide therapy, diagnose, or give individualized investment or legal advice. Anything that calls for clinical care is referred back to your staff.

Will this fit with our treatment approach?

It is designed to support it. The course is built on the PERMA wellbeing model and uses a nonjudgmental, strengths-based tone. I welcome your clinicians' feedback on language, topics and framing, and I'm glad to adjust.

What if a client becomes emotional or discloses something serious?

I pause, acknowledge it, and direct the client to their clinician or your staff. I follow your program's escalation protocol, so please share it, and ideally a staff member is on hand during sessions.

Do you need client records? How is privacy handled?

No. I don't need access to health records or treatment information. Participants never have to share personal financial details in group, and worksheets stay with them. I'm glad to sign your confidentiality agreement.

Do you sell products or solicit clients?

No. I don't sell insurance, investments or other financial products, and sessions are never used to recruit clients.

What do you need from our staff?

Very little. All classes are taught live and virtually by me, so you provide a scheduled time slot and a private space with a screen or device for clients to join. If clients gather on site, a staff member to print the handouts and worksheets I send in advance. Staff are encouraged to sit in.

Can clients join mid-series?

Yes. Each session stands alone and opens with a quick recap of the Wealth Ladder, so new clients are never behind.

How long is the program, and how flexible is it?

From a single workshop to a 6-week series, a 12-week series, or a rotating cycle, matched to your program's length and schedule. Sample pathways are in the Curriculum Overview.

What topics are covered?

Budgeting on a reset income, banking, credit, facing debt and collections, fines and restitution, financial triggers and safeguards, scams, saving, insurance, and longer-term goals. Topics can be tailored to your population, such as justice-involved clients.

What do participants receive?

For each session: slides, printable worksheets and links to trusted resources. Slides with resources can be sent to participants.

How do you measure results?

I can share participant feedback from my current program, and I'm happy to add a short pre/post survey so you can see changes in knowledge and confidence.

What are the compliance basics?

I'm glad to complete a background check, provide proof of liability coverage, and sign your vendor or contractor agreement. Requirements vary by facility and state, so tell me what yours are.

How is it priced?

Options include per session, per series, or an annual rate. Most programs choose per-session invoicing, so if I am sick or unable to teach a session, you are not charged for it. I'm happy to provide a quote based on your program's size and schedule.