



Financial Literacy & Coaching Resources

1. CLC Consulting (Family Trauma & Financial Literacy Workshops)

Partners with Boston Public Schools to offer in-person financial literacy workshops tailored for families, often framed through trauma-informed learning.

Phone: 800-794-1349

2. JVS Boston – Financial Education & Coaching Services

Provides one-on-one financial coaching, budgeting, credit guidance, free tax prep via VITA (seasonal), and education workshops.

Phone: 617-399-3131

3. City of Boston Center for Working Families – Financial Coaching & Workshops

Offers free individualized financial coaching (budgeting, credit, savings planning) and monthly group workshops at their Roxbury center.

Phone: 617-541-2670

4. Community Teamwork Inc. – Financial Education Center

Delivers workshops and one-on-one counseling covering budgeting, credit repair, asset building, student loan support, and tax prep assistance.

Phone: Contact via Community Teamwork Boston location (check local service center)

5. CFA Society Boston – Financial Literacy Initiative

Community volunteers provide classroom and community group presentations on budgeting, credit, saving, basics of investing, and retirement preparation.

Phone: 617-451-6500 (CFA Society Boston main line)

6. UMass Boston U-ACCESS – Student Financial Literacy Program

Offers a free self-directed platform for students on financial aid, loan repayment, budgeting, scholarships, and credit management. Open to UMass Boston students.

Phone: Contact U-ACCESS via UMass Boston main campus

7. MassBay Credit Union – Free Financial Education & Counseling

Membership provides access to webinars, online courses, credit coaching through GreenPath, tools for housing, debt, savings, and budgeting.

Phone: Contact MassBay Credit Union customer service for financial education referrals

8. CSNDC (Codman Square Neighborhood Development Corporation) – RI\$E Financial Fitness Program

Supports residents with workshops and coaching on asset building, financial management, credit, and long-term stability.

Phone: Contact CSNDC main Boston office for program details



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