

Welcome!



Our mission is to empower consumers to effectively manage their finances, create economic security, and realize equality of access and opportunity.



Breadth of Services



- ▶ Budget Counseling
- ▶ Credit Counseling
- ▶ Credit Report Review
- ▶ Action Plans with Feedback
- ▶ Debt Management Plans
- ▶ Representative Payee
- ▶ Housing Counseling
- ▶ Student Loan Counseling
- ▶ Bankruptcy Counseling
- ▶ Financial Literacy Resource
- ▶ Customized Presentations
- ▶ Embedded Counselors



CAF – Capacity

- ▶ 25 years
- ▶ 10 Certified Personal Finance Counselors
- ▶ All Counselors cross trained in housing, student loan counseling, and other areas
- ▶ Multiple language capabilities
- ▶ Access to credit files (soft pulls)
- ▶ Subject Matter Experts



Partners



- ▶ Bridges Out of Poverty
- ▶ Omaha Housing Authority
- ▶ Catholic Charities
- ▶ Heartland Family Service
- ▶ Financial Hope Collaborative
- ▶ Omaha Public Library
- ▶ Project Houseworks



Learned to save and manage \$

Excited

I learned a lot

Can check my own credit file

Encouraging Plan

Appreciate the depth and breadth of info

Save

Helpful Information

Credit Advisors Foundation

Valuable Information

Helped me budget money wisely

Good credit vs bad credit

Budget Beyond Grateful

I can earn good credit

Information we can use

Protect my information



Goals for our Clients

Engagement with Credit Reports and Budgets

Decreased Debt Service

An Action and Savings Plan

Increased Economic Inclusion

Cross Referrals for Needed Services



Client Outcomes



- ▶ Client Financial Self Sufficiency = CONTROL
- ▶ Financial Goals = FOCUS
- ▶ Financial Mainstream = CHOICE



Typical CAF Client

- ▶ Anyone having financial difficulty or could use access to better financial products.



Client Experience

- ▶ Budget Counseling
- ▶ Credit Counseling
- ▶ Credit Report Review
- ▶ Action Plans with Feedback
- ▶ Follow Up Counseling



How to Refer

- ▶ Credit Advisors Foundation brochure with FNB contact info
- ▶ FNB Contact hotline = 1-800-353-3493
402-514-3351
- ▶ Email lisa@creditadvisors.org
todd@creditadvisors.org
darlyn@creditadvisors.org (Spanish)
- ▶ In Person – 1818 S 72nd Street (Corporate Office)
5006 Ames Ave (M &W) (FNB Branch)
1228 S Main Street (Council Bluffs)





Thank you!

Questions?