

## MODULE B

# WHEN: Knowing this important number gives you the ability to have a different relationship with money and wealth



*“It’s time there was a professional who can help individuals get over their confusion and fear over retirement. And before you can help others, you need to know your own score!”*

Module B gives you your first exposure to the WHEN-Score™, the original measurement tool of URSLA™.

Is it possible to have fun while learning important communication skills and how to speak with people about their finances?

Using an entertaining lesson to learn how a Certified Financial Coach would work with a client, you become a co-star by reading a script and playing the part of a professional working with a highly money driven engineer.

Then you experiment--finding how easy it is to use the WHEN-Score to play with variables that can make a difference for your client’s resource longevity (URSLA™). What happens when a person decides they want to retire sooner or work longer?

## **MODULE B Independent Study Guide covers...**

- A INTERESTING LESSON IN BECOMING THE OBSERVER
- LEARNING TO USE TOOLS AND MATERIALS USED BY CERTIFIED FINANCIAL COACHES™
- EXPERIMENTING WITH YOUR OWN AND OTHER CASE STUDY INFORMATION
- BECOMING A RESPECTED PROFESSIONAL IN THE AREA OF RETIREMENT BY UNDERSTANDING INTERRELATIONSHIPS WITH TECHNOLOGY TO MEASURE URSLA™
- A SIMPLE INTRODUCTION TO MEDICARE AND SOCIAL SECURITY AND AN UNDERSTANDING OF RESOURCES TO HELP PEOPLE APPROACHING RETIREMENT