



CHICO STATE
Financial Wellness Clinic

Program Overview

The Clinic Operations

The Financial Wellness Clinic operates on the Chico State campus, and serves approximately 300 clients per year.

Clients include students, faculty, staff, and off campus clients. Approximately 86% of visits are students.*

The Clinic is staffed by 5 student para-planners and One CFP faculty member.

Every client leaves their meeting with detailed notes of the conversation and a list of next steps to complete before a follow up visit.



*measured from 7/1/21 to 10/23/24

Program Overview

The Clinic Operations

Common recommendations for our student clients include:

- Enrolling in PG&E's CARE Plan
- Refinancing personal debt and beginning a debt repayment plan
- Creating a written budget and sticking to it
- Helping with tax preparation
- Changing payroll withholdings
- Opening a savings account
- Signing up for employer benefits
- Student loan repayment planning



*measured from 7/1/21 to 10/23/24

Financial Wellness Clinic

- Financial Wellness Clinic
- Take a Survey
- Book an Appointment**
- What's New
- Request A Campus or Community Workshop
- Become a Paraplanner

Our Office

Clinic Location
Glenn Hall, Room 202B
financialwellness@csuchico.edu

Drop-in Hours Spring 2024
All Drop-in hours are in Glenn 202B or Zoom
Mon. 10:00 AM - 5:00 PM
Wed. 10:00 AM - 4:00 PM
Tues. & Thur 11:00 AM - 1:30 PM
Fri. 9:00 AM - 11:00 AM

[View on Map](#)

[More Contact Information](#)

Financial Wellness Clinic



Do you find yourself struggling with financial stress? The Financial Wellness Clinic has now opened its doors to the campus community. We will be offering financial planning information to students, faculty and staff in the areas of budgeting, credit scores, student loan repayment, retirement planning, and many other areas of personal finance. If you are struggling with financial stress and need someone to talk to, anyone on campus is welcome to sit down with our resident financial planner or our para-planners to discuss

Announcements

- [Did You Know October is National Financial Planning Month?](#)

[See all announcements...](#)

Give a Gift

Financial Wellness Clinic

FINANCIAL WELLNESS | BOOK AN APPOINTMENT

[Financial Wellness Clinic](#)[Take a Course](#)**[Book an Appointment](#)**[What to Expect](#)[Request A Campus or Community Workshop](#)[Become a Paraplanner](#)

Book an Appointment

If you'd like to book an appointment with a peer paraplanner you can use the tool below to do that. You may also come to Glenn Hall 202b during our drop in hours. This semester's drop in hours are listed on the bottom left of this page. To book a time, select your service, your paraplanner, and a date and time that work for you. You will receive a confirmation email within minutes, and a reminder email 24 hours in advance.

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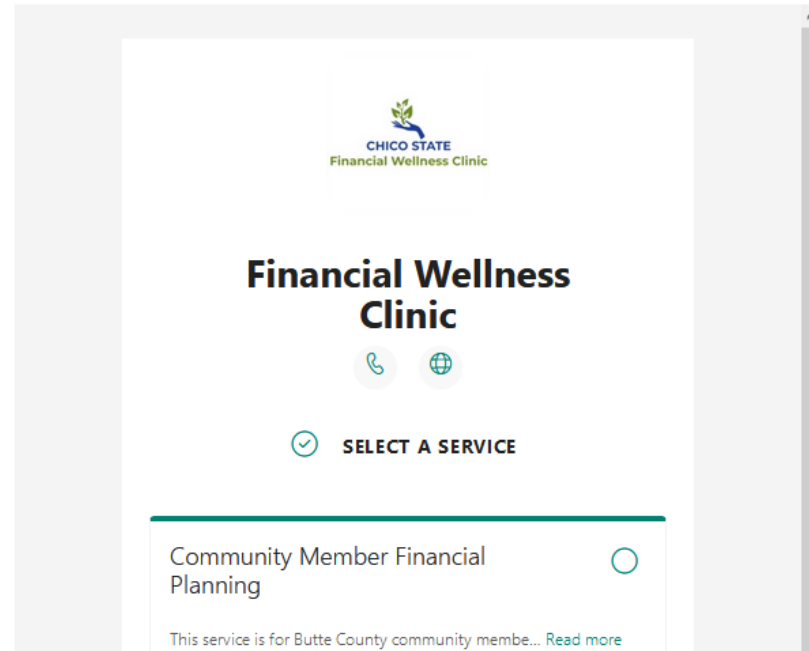
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[View on Map](#)

[More Contact Information](#)



The screenshot shows the booking interface for the Financial Wellness Clinic. At the top, there is a logo for "CHICO STATE Financial Wellness Clinic" with a green leaf icon. Below the logo, the text "Financial Wellness Clinic" is displayed in a large, bold font. Underneath, there are two circular icons: a telephone icon and a globe icon. A green checkmark icon is followed by the text "SELECT A SERVICE". Below this, a list of services is shown, with "Community Member Financial Planning" selected, indicated by a green circle next to it. Below the service name, there is a small text line: "This service is for Butte County community membe... Read more".

Program Overview

The Clinic Operations

Clients book appointments with our student para-planners on our website, by email or by phone. They are paired with a para-planner who will follow the CFP Board 7-step process for financial planning.



As part of our CFP Board registered program, students pursuing a CERTIFIED FINANCIAL PLANNER™ Certification have the opportunity to work in the Clinic and gain experience hours towards their CFP® certification.

EDUCATION COURSEWORK REQUIREMENT

FIND AN EDUCATION PROGRAM

Search for colleges and universities with CFP Board Registered Programs that satisfy the education coursework requirement. All programs cover the required financial planning topics, but vary in style, length, and delivery method. CFP Board does not endorse one registered program over another.

[CHOOSING THE PROGRAM THATS RIGHT FOR YOU](#)

FILTERS

2 RESULTS

SORT BY: Provider Name A-Z

INSTITUTION OR PROGRAM NAME

chico

FORMAT

- Classroom/Blended 1
- Online Instructor-Led 0
- Online Self-Study 1

PROGRAM TYPE

CFP coursework can be completed as part of a stand alone certificate program — or as part of an accredited degree program.

- Certificate 1
- Bachelor's 1
- Graduate 0
- PhD 0
- Accelerated Path Capstone 1

STATES

CA

FILTERED BY: chico CA Clear All

CALIFORNIA STATE UNIVERSITY - CHICO

FINANCIAL PLANNING CERTIFICATE

[PROGRAM WEBSITE](#)

CONTACT

Mr. Jaycob Anthony Arbogast,
Director
cef@csuchico.edu
400 West First Street
Chico, CA 95929
5308985920

PROGRAM TYPE

Baccalaureate

FORMAT(S)

Classroom/Blended

ONLINE FINANCIAL PLANNING CERTIFICATE

[PROGRAM WEBSITE](#)

CONTACT

Mr. Jaycob Anthony Arbogast,
Director, Center for Excellence in
Finance
cef@csuchico.edu
400 West First Street
Chico, CA 95929
530-898-5920

PROGRAM TYPE

Certificate, Capstone

FORMAT(S)

Self-Study



CHICO STATE Financial Wellness Clinic

CHICO STATE FINANCIAL WELLNESS CLINIC ORGANIZATION WEBSITE

PRO BONO OPPORTUNITIES (1)

Help us provide financial guidance to low income families in Northern California

Chico State Financial Wellness Clinic | Virtual | Ongoing

The Financial Wellness Clinic

The Financial Wellness Clinic has served the Chico, California community for nearly 10 years. We began by serving students at Chico State, but quickly grew to support the local...

ABOUT THE NONPROFIT

Name	Chico State Financial Wellness Clinic
Location	Chico, CA
Population served	Single Parents, , Low- to- Moderate Income (general), , Communities of Color
Overview	The Financial Wellness Clinic provides free financial information and coaching to

Affordability

Client Statistics

Unique Client Type

Community Member

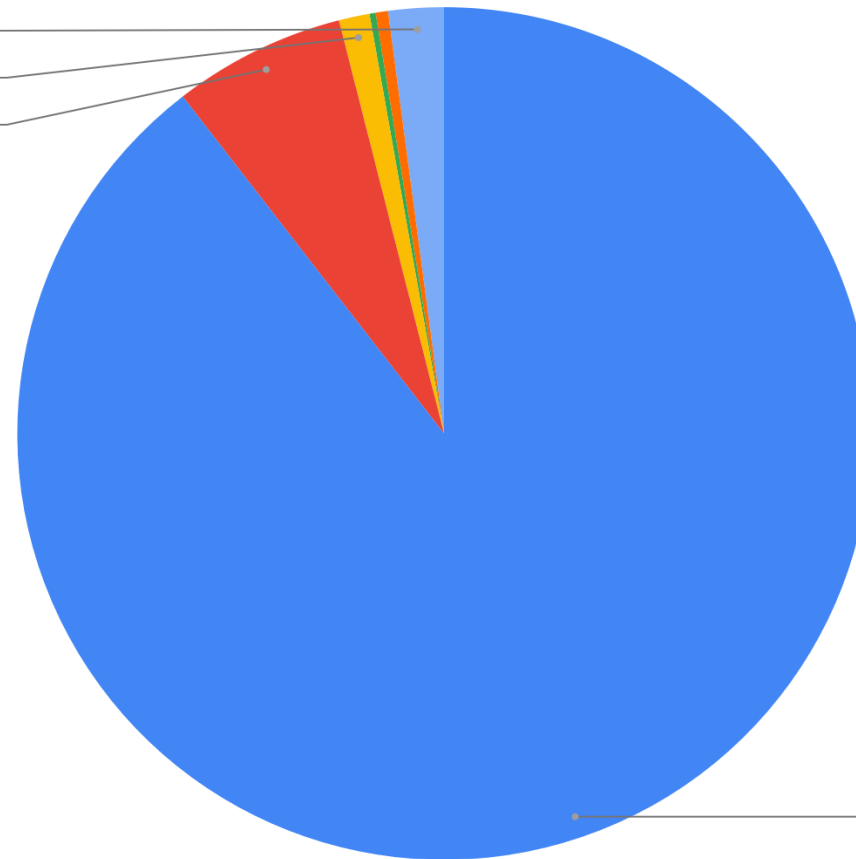
2.1%

Alumni

1.2%

Staff

6.5%

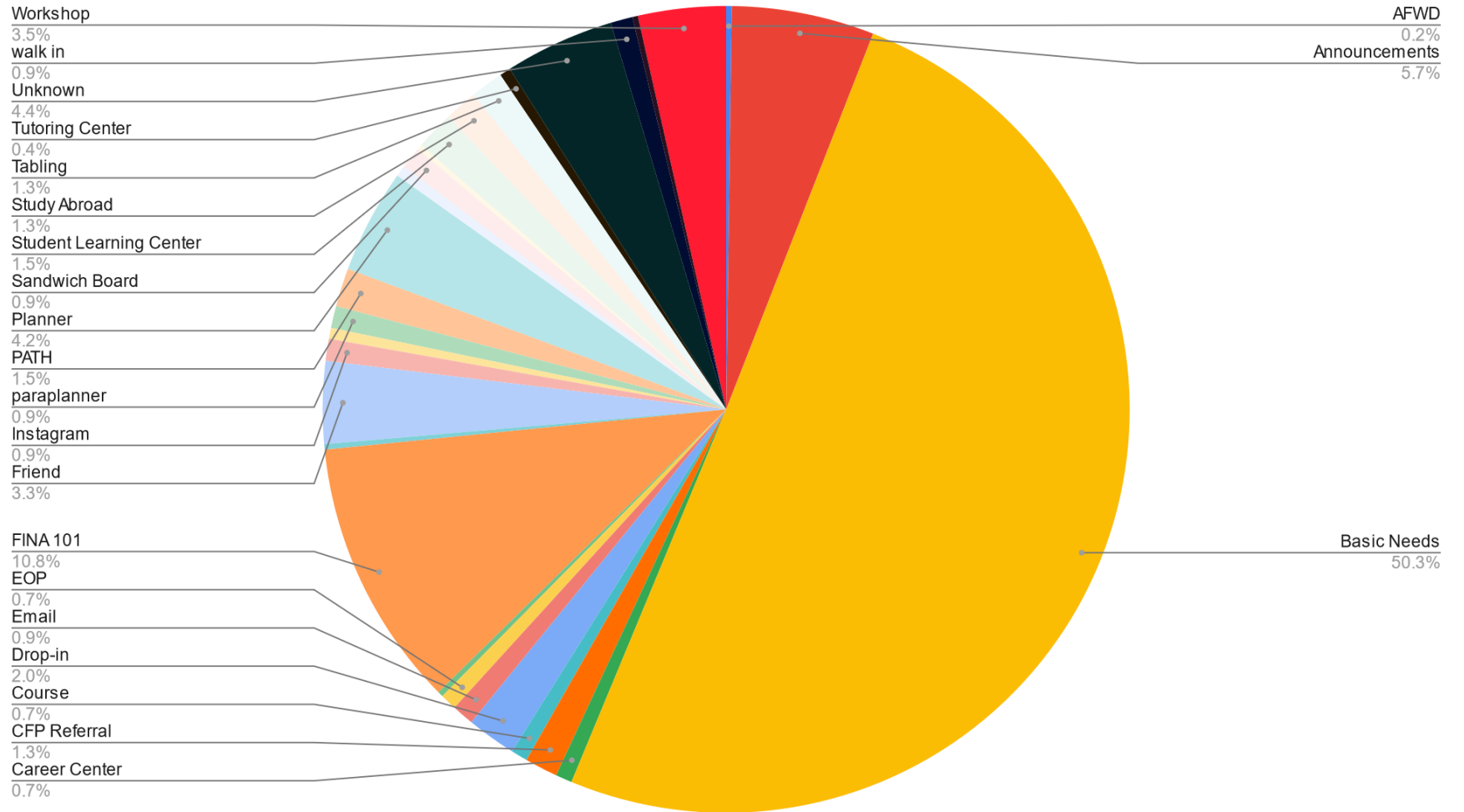


Student
89.5%

Affordability

Client Statistics

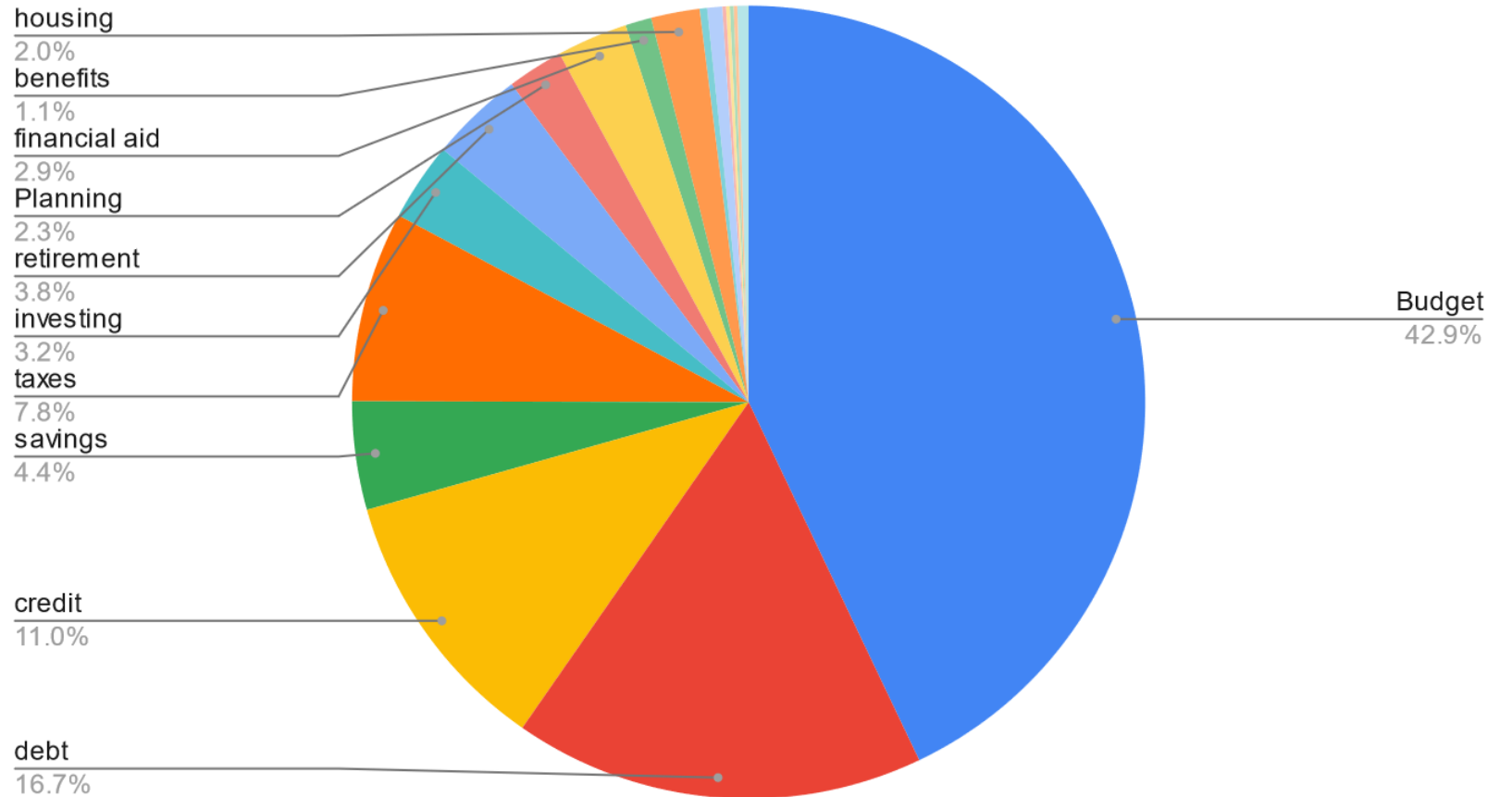
Primary Source/Count vs. Primary Source/Referral Source



Affordability

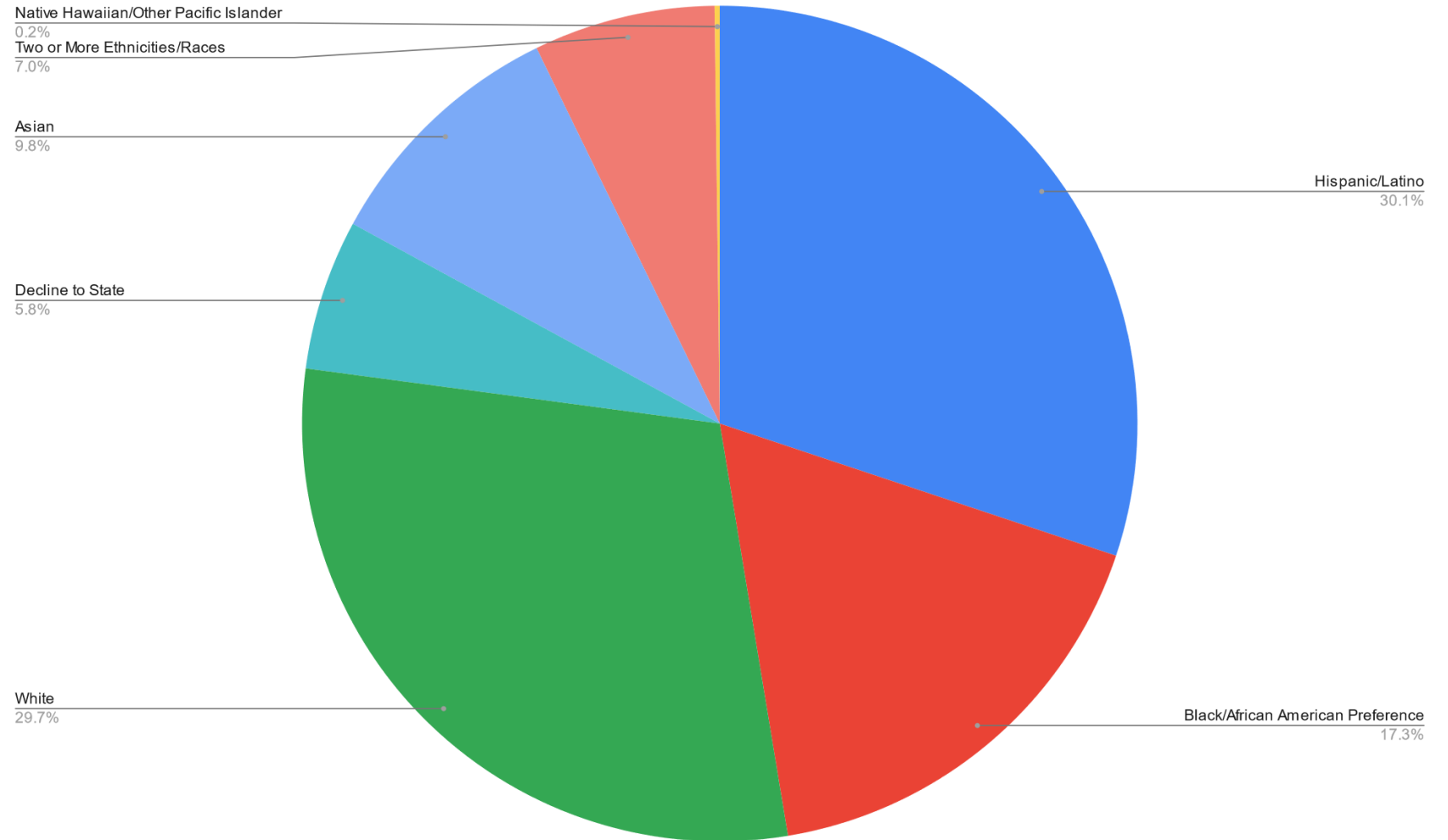
Client Statistics

Primary Concerns by Clients



Affordability

Client Statistics



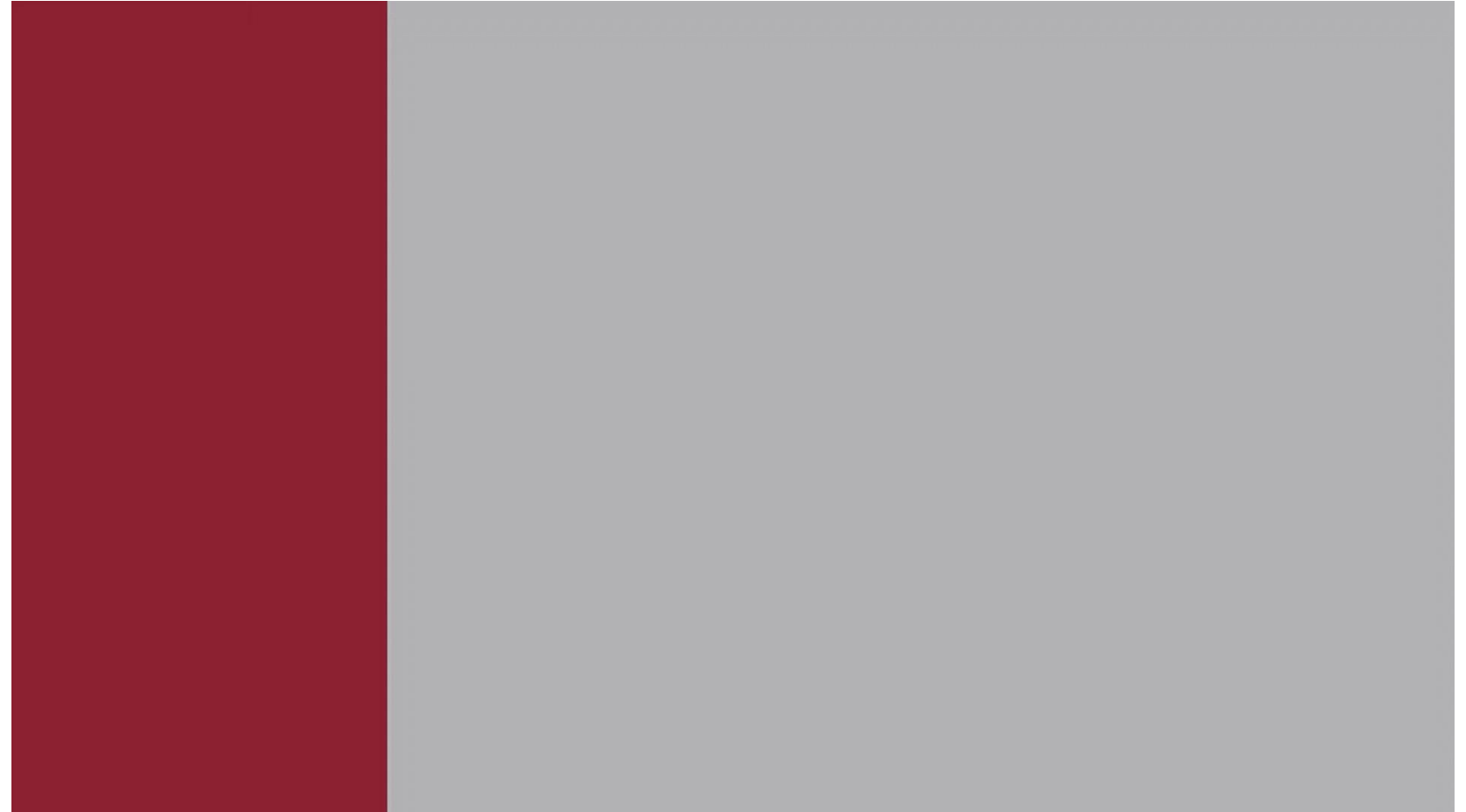
Student Experience

Juan Lozano
Para-Planner



Student Experience

Deja Wilson
Client



Q&A

Jaycob Arbogast
CSU, Chico
College of Business
Glenn 315
530-898-5920
jarbogast2@csuchico.edu