

From hardship to hope: Strategies to foster financial wellness

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Webinar details

Type of activity: Instructor-led recorded webinar (home study)

Cost: Free of charge

Duration/time: 1.5 CE hours (90 minutes)

Speaker:



Oscar Jiménez-Solomon, MPH
Research scientist, New York State Psychiatric Institute, Columbia University Irving Medical Center; and PhD student researcher, Columbia University Center on Poverty and Social Policy

Target audience: This presentation is for people in recovery and behavioral healthcare providers, including peer support professionals, and administrators, policy makers and researchers.

Goal: To provide attendees with an overview of two concrete tools they can use to foster financial wellness among those they support: The Financial Engagement Tool and Financial Wellness Action Plan.

Learning objectives: Upon completion of this webinar, participants will be able to:

- Provide at least one example for each domain of financial wellness: stability, security, control, autonomy and citizenship.
- List at least three strategies to promote financial wellness among people in recovery, including: engaging individuals in culturally meaningful conversations about their life dreams and financial goals, building hope about individuals' financial future, developing a financial wellness action plan, linking individuals to financial services and supports, and providing emotional/social support.
- Describe the importance of engaging individuals in conversations about their personal financial

stressors and motivations to pursue financial wellness goals, and why these matter in the context of their personal goals and cultural identities.

- Describe the core elements of an effective Financial Wellness Action Plan: financial wellness goals, financial wellness agency (capital), financial wellness pathways (supports) and action steps.

Course outline: In this webinar, the presenter will cover:

- The relationship between financial wellness, mental health and suicide prevention: A brief overview of the evidence
- Five domains of financial wellness: stability, security, control, autonomy and citizenship
- The financial empowerment process: engaging individuals in culturally meaningful conversations about their life dreams and financial goals, building hope about individuals' financial future, developing a financial wellness action plan, linking individuals to financial services and supports, and providing emotional/social support
- The Financial Wellness Engagement Tool: an overview
- The Financial Wellness Engagement Tool in practice: exercise
- Overview of the Financial Wellness Action Plan
- Developing a Financial Wellness Action: exercise
- Available financial wellness supports to receive financial counseling, build credit, manage debts and create an emergency fund

About the speaker

Oscar Jiménez-Solomon, MPH, is a researcher and advocate whose work is informed by his personal experience with financial hardship, distress and recovery. He has served as research scientist at the Center of Excellence for Cultural Competence, New York State Psychiatric Institute, Columbia University Medical Center since 2013. Currently, Oscar is principal investigator of a study funded by the American Foundation for Suicide Prevention to develop and pilot From Hardship to Hope, a peer-led financial wellness intervention to reduce financial hardship and suicide risk.

Oscar holds a master's degree in public health from Columbia University and a bachelor's degree in sociology from the Pontifical Catholic University of Peru. He is currently pursuing a PhD in social policy at Columbia University. As part of his doctoral research, Oscar is conducting a study at the Columbia Center on Poverty and Social Policy to better understand how financial hardship and psychological distress reinforce one another and identify the best program policies that can break the cycle of impoverishment and mental health decline.

Mr. Jiménez-Solomon is a member of the New York State Suicide Prevention Council, Academy of Peer Services Advisory Board, and Board of Directors for the National Disability Institute (NDI). Between 2008–2012, Oscar served as the director of community and economic development at the New York Association of Psychiatric Rehabilitation Services (NYAPRS), where he spearheaded “We Can Work” and “We Can Save,” two grassroots campaigns aimed at promoting employment and economic self-sufficiency for people with psychiatric conditions. Oscar has co-authored manuals, training programs, books and research papers in the United States and Latin America.

Disclosures: Oscar Jiménez-Solomon has no relevant financial relationship commercial interest that could be reasonably construed as a conflict of interest.

CE credit eligibility

Eligible CE hours: 1.5 CE hours (90 minutes)

Upon request, all other health care professionals completing this event will be issued a certificate of participation. For information on applicability and acceptance of CE hours for this activity, please contact your professional licensing board.

How to obtain CE hours: To obtain CE clock hours you must view the course in its entirety and complete the course post-test (80% passing score required) and evaluation via a web link to be displayed after the conclusion of the course. Upon completing the course requirements, you will be issued a certificate. Partial attendance is not accepted.

If you have questions about the course requirements or CE hours, contact:

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Email: ce@magellanhealth.com

Approval statements: Magellan has been approved by the Florida Certification Board (FCB) as an Approved Continuing Education Provider, FCB No. 5376-A.

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Additional information

Commercial support: Magellan did not receive any commercial support for this continuing education program.

If you have questions or would like additional information regarding the content or level of this activity, the speaker's potential or known conflicts of interest, activities not offered for CE credit and/or technical assistance, contact:

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Requesting special accommodations: Magellan will make reasonable accommodations for participants with physical, visual or hearing impairments.

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