



Certified Facilitator Training Agreement

Financial Education Program

Training and Certification

1. You are applying for training in the *Faith & Finances* Facilitator Certification Course (the “Course”) to be held by The Chalmers Center for Economic Development (“Chalmers”) for the purpose of becoming a Certified Facilitator in Financial Education (“Certified Facilitator”). Certified Facilitators are allowed to use Chalmers’ *Faith & Finances* Financial Education Curriculum (“Curriculum”) to train low-income people in financial literacy education.
2. Certification as a *Faith & Finances Certified Facilitator* requires successful completion of the Course, which includes full attendance of all sessions of the Course (both online and live sessions), and proficiency as a Certified Facilitator in the Curriculum. If you fail to successfully complete any portion of the Course (online or live) for any reason, you understand that you forfeit your right to use the Curriculum.
3. If you make a request to drop the Course before the first day of the online course, you will receive a refund, minus a \$50 cancellation charge. If you request to drop after the start of the online course, you understand that your training fee is non-refundable. You understand that you must pay the training fee again if you register for a future course.
4. Certification will be effective for two years after you are certified. At the end of the 2-year period, you can renew your certification for another 2 years by submitting a Facilitator Recertification Form and a \$50 fee to Chalmers. For more on the **Benefits of Certification**, go to <http://www.chalmers.org/work/gtc/wst/benefits>.

Intellectual Property

5. The Course includes training regarding proprietary intellectual property owned by Chalmers, including written materials; research and related data and analysis; training techniques; and audio/visual presentations (the “Proprietary Materials”). I acknowledge and agree that the Proprietary Materials are the sole and exclusive property of Chalmers and may not be used other than strictly in accordance with the Agreement as described.
6. The Proprietary Materials include copyrighted written materials, including the book titled *When Helping Hurts*, the Course titled *Faith & Finances Facilitator Certification*, and the Curriculum titled *Faith & Finances*. I acknowledge and agree that under no circumstances will I be permitted to photocopy or otherwise duplicate these Proprietary Materials, except as expressly permitted in the Agreement. When using proprietary materials and concepts, I agree to honor Chalmers’ copyright and other intellectual property rights associated with the Proprietary Materials by displaying the copyright on the material or citing the applicable material within the Proprietary Materials as the source.
7. Chalmers reserves the exclusive right to publish and certify, along with the right to reproduce, distribute, perform, and/or display, any derivative works arising from its Curriculum which may be created by the Certified Facilitator, including any presentations, workshops, or other type of training.

Limited Certification

8. Chalmers grants you, as a Certified Facilitator, limited non-exclusive certification and right to use and present the Curriculum during the period of your Certification and subject to this Agreement, including without limitation the following terms and conditions:

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- 8.1 You are authorized only to use Chalmers' Curriculum to train low-income people in financial education. You are **not** authorized to train and certify other Certified Facilitators. You agree to refer individuals, churches, and organizations requesting facilitator certification to Chalmers.
- 8.2 You are authorized to make minor contextual adjustments to the Curriculum that do not alter the integrity of the technical content. The Chalmers Center encourages you to share copies of any significantly modified, adapted or contextualized material that may be helpful in future curriculum development.
- 8.3 Chalmers has the right, at its sole cost and expense, to attend any presentation for the purpose of evaluating the implementation of Chalmers' Curriculum; supporting the Certified Facilitator with additional consultation; and documenting stories for communication to Chalmers' constituents.
- 8.4 You agree to submit reports and data to Chalmers describing your participants and the use of the Curriculum each time you hold a *Faith & Finances* offering or any derivative. *For more on **Reporting and Core Expectations**, go to <http://www.chalmers.org/work/gtc/wst/trainer/expectations>.*
- 8.5 The 2-year Facilitator Certification terminates automatically on the earlier of (a) expiration of your Certification or (b) ten (10) days after your receipt of written notice from Chalmers of any default of the terms of the Certification or this Agreement which is not corrected within such ten-day period.

General Terms

- 9. I, as a training participant, understand, acknowledge, and agree to all of the terms and conditions set forth herein; furthermore, I will use the Curriculum at my own risk, and will indemnify and hold Chalmers harmless from any claims related to my use of Chalmers' Curriculum.
- 10. This Agreement may not be amended except by written agreement by both parties.

[PRINT] Name, Title

Signature

Date: _____

Certification Training Dates: _____

Certification Training Location: _____