

# Personal Finance Coaching Program

**Financial Coaching** is an ongoing partnership between the coach and the client to explore and create financial goals, help move through obstacles and establish an accountability process that supports forward progression to desired achievements.

## **The OBJECTIVES of Financial Coaching revolves around CLIENT outcomes:**

- Helping clients to identify possibilities to modify behaviors/circumstances that may have negatively impacted credit worthiness and financial stability.
- Assisting clients in exploring methods to manage their financial situation and to use the appropriate tools to do so.
- Facilitating the development of client action plan to increase credit scores and reduce debt.
- Fostering a process to assist clients to establish and/or maintain a customized asset-building plan for long-term financial stability.

## **Financial Coaching Sessions – Partnering for EXPLORATION AND SOLUTIONS.**

**Coaching Session 1** – Financial Assessment and Goal Definitions

**Coaching Session 2** – Income Generation, Credit & Debt Management

**Coaching Session 3** – Spending Plan, Asset Building and Asset Protection

**Coaching Session 4** – Life Perspective Alignment and Financial Implementation

## **The COACH is the client’s PARTNER and CHAMPION for success.**

In each session, the **client chooses** the focus, while the coach listens and contributes observations and questions. This interaction creates clarity and accelerates the client's progress by providing greater focus and awareness of choice. Financial/Life Coaching concentrates on where clients are today and what they are willing to do to get where they want to be tomorrow.

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