

FINANCIAL COACHING PROCESS



INFORMATION SHEET

01. Please review the coaching profile sheet. The Financial Leadership coaching application lets you identify up to three individuals that you may like to receive coaching from. We cannot guarantee that you will be paired with a coach you name, but we will work with diligence to try to connect you with one of the three that you list.

02. You can receive up to four coaching sessions. It is expected that you will connect with your coach no less than once a month and your coaching sessions will be complete by the end of four months. You can, of course, meet at a swifter pace than once a month up to the four-session limit.

03. You will be required to sign and submit the Financial Leadership Coaching Program Agreement before coaching begins. Please mail this to:

Financial Leadership C/O Marti Burger
Evangelical Covenant Church
8303 W. Higgins Road
Chicago, IL 60631

04. You will be asked (not required) to send your Jump Start financial road-mapping work to your coach. This includes your spending plan, credit/debt, and net-worth worksheets along with the Personal Finance Wheel and a statement of your financial goals. This will help maximize your time. Please do not send any financial statements – only your Jump Start material.

05. A typical coaching session will last approximately 60 minutes.

06. It is expected that most coaching will occur from a distance through Skype, ZOOM, phone, or other long-distance mediums.

07. At the completion of all your coaching sessions you will be required to fill out an evaluation form. Coaches will also be asked to do a thumbnail summary and evaluation of the coaching interaction. These evaluations are how we report value and impact to the Lilly Endowment. Our learning is the currency we provide the Endowment for the gift of the grant. No other records of the interactions will be kept.

(Page two for outline of what a first coaching session might look like)

What will the first coaching session consist of?

FIRST MEETING SUGGESTED AGENDA (75 MINUTES) INTRODUCTION AND GAINING FOCUS

It is expected that the first session will take a little longer than the sessions that follow.

5 minutes. Review the Financial Coaching Agreement.

3 minutes. Coach shares briefly about their financial journey.

5 minutes. Participants Identify what brought them to coaching.

20 minutes. Review the reflection questions from p. 12 of the Jump Start material and identify goals, dreams, values, strengths, and fears. The reflection questions from the Jump Start workbook are now on page 16 & 17, if you are using new material.

10 minutes. Review the participants personal finance wheel and their top financial road-mapping goals.

20-25 minutes. Establish a road-map. Help participants Identify one action item, the action step(s) associated with this item, accountability measures, and any between-session homework.

5 minutes. Establish date and time for the next session.