

FINANCIAL LEADERSHIP COACHING PROGRAM AGREEMENT



The goal of The Evangelical Covenant Church (“ECC”) Financial Leadership Coaching Program is to help ECC pastors and their families reach their financial goals under the following parameters:

01. All Information disclosed to the coach from the participant regarding the participant’s financial situation will be held by the coach in strict confidence.
02. Attendance at all meetings is required.
03. Both the coach and the participant will respect one another’s time. This means being on time for meetings and notifying one another in advance of any need to reschedule appointment. The participant and the coach will strive to meet on a monthly basis.
04. The coach is not acting as a financial planner or advisor, and cannot render any advice to the participant in connection with investment options. The role of the coach is to listen to the participant’s financial concerns, and help the participant establish and attain goals with respect to financial health.
05. The participant assumes total responsibility for all decisions made about his or her personal finances, and will not hold the coach, The Evangelical Covenant Church, or any affiliates of The Evangelical Covenant Church responsible for any consequences resulting from the participant’s choices or actions.

I, as Participant, understand that the goals of the ECC Financial Coaching Program are as follows:

- Help me to understand issues, resolve problems, and pursue my financial goals.
- Provide me with information, education, and guidance so I am able to make financial decisions on my own behalf.
- Help me identify and use resources to address my needs and promote my financial wellness.

I, as Participant, understand that my Coach will not make decisions for me or make contacts to creditors or others on my behalf. Making decisions and taking action will be my responsibility. I understand that as participant in the program, I will not receive legal or investment advice. The role of my coach is to support and encourage me. Ultimately, I am solely responsible for my actions taken in furtherance of the financial goals developed hereunder.

Participant’s Name _____ Signature _____ Date _____
Participant’s Name _____ Signature _____ Date _____
Coach’s Name _____ Signature _____ Date _____

APPLICATION FOR FINANCIAL COACHING QUESTIONNAIRE

Please answer the following questions related to your participation in Financial Coaching.

- **Have you participated in a Jump Start Retreat?** Yes No
- **Have you taken the online financial fitness survey?** Yes No
- **Please identify your take-aways from the Jumpstart retreat.**

- **What prompts your desire for financial coaching?**

- **What do you need from a financial coach? Name two or three areas you wish to work on with a coach.**

- **What are your hoped outcomes?**

- **Read through the coaches bios on the Financial Leadership website and identify up to three individuals you would be interested in being paired with for coaching.**

- **Have you signed the voluntary coaching agreement?** Yes No

Signature _____ Date _____