

## Get Coached! Become a Coach!

### How to take advantage of this program!

- Go directly to the online form at <http://bit.ly/WalCoCoach>
- Fill out and return the form on the reverse side of this panel.
- Go to our website at <https://walworth.extension.wisc.edu/> and then click on the “Health, Families and Finances” tab to find the Financial Coaching page.



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If you have any questions, please contact  
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<https://walworth.extension.wisc.edu/>



## FINANCIAL COACHING

*for individuals and families*



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# Financial Coaching Interest Form

## What is Financial Coaching?

Financial coaching means providing regular one-on-one sessions in order to ‘coach’ to meet goals mutually set by the coach and client. Coaching is differentiated from counseling in that coaches are not “experts,” but instead they provide encouragement and monitoring over advice, and do so in a process largely driven by the client.

A coach can provide a much-needed boost to self-control along with the flexibility to change strategies as the client’s financial situation changes.

Coaching is different from counseling or mentoring and focuses more on ongoing behavior change, executive attention and goal setting, and goal monitoring.

- Financial Goals Great for Financial Coaching
- Setting up and sticking to a spending plan/ budget
  - Getting out of debt
  - Buying a house in the next 1-3 year(s)
  - Planning to retire
  - Planning for future educational expenses
  - Planning a financial future with a new spouse/ partner
  - Planning to be independent
  - Paying bills on time every month



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Requests for reasonable accommodations for disabilities or limitations should be made prior to the date of the program or activity for which it is needed. Please do so as early as possible prior to the program or activity so that proper arrangements can be made. Requests are kept confidential.

Name:

Phone Number:

Email Address:

Mailing Address:

- I would like to be a COACH  
You will be contacted via email with training options.
- I would like to be COACHED  
What financial goal(s) would you like you and your coach to focus on?

Please return this form:



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