



C.A.S.H. COACH PROGRAM AGREEMENT

The C.A.S.H. Coach program is designed to help individuals and families achieve their desired financial goals. Each coach and partner team (Team) will work together to accomplish the goals within the following guidelines:

As a Coach, you agree to:

1. Work with your partner through May 2010 to provide guidance, support, encouragement and accountability as he/she works to accomplish identified financial goals.
2. Refrain from any judgment of your partner or their financial situation.
3. Respect the confidentiality of your partner and others; furthermore, do not retain any copies of their personal financial information.
4. Attend all required meetings: including orientation, group sessions and graduation.
5. Complete and return all required forms accurately and promptly, especially monthly session reports.
6. Utilize only financial tools provided by the C.A.S.H. Coach Program.
7. Abstain from using your position as a Financial Coach for your own personal or business purposes.

I understand that financial coaching is for educational purposes only, not for soliciting or providing professional counsel to partners.

Coach's Name

Signature

Date



The Honorable Michael A. Telesca Center for Justice
1 West Main Street ♦ Suite 200 ♦ Rochester, NY 14614
Phone: 585.454.4060 ♦ Fax: 585.454.2518
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As a partner in the C.A.S.H. Coach Program, I understand that:

1. Attendance at all program and monthly meetings is required.
2. All information about my financial situation will be held in strict confidence.
3. My coach is a financial educator and that he/she cannot give me financial or legal advice, but can only present me with various resources and options, coaching, and encouragement.
4. My coach is a volunteer and does not receive any financial compensation for assisting me.
5. I must respect my coaches' time and be on time and prepared for all scheduled meetings. If I have a conflict, I will give my coach ample advance notice to reschedule any appointments.
6. I assume total responsibility for the decisions I make about my finances and will not hold the Financial Coach or C.A.S.H. responsible for any consequences resulting from my choices or actions.
7. I may be removed from the program if I do not adhere to all guidelines and expectations of the Coach Program.

Partner's Name

Signature

Date



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