

# Financial CHANGE Program 2010-2011

## FINANCIAL CHANGE PROGRAM VOLUNTEER AGREEMENT

The Financial CHANGE 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 for the next 6 (six) months 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, monthly workshops, and six-month celebration.
5. Complete and return all required forms accurately and promptly.
6. Utilize only financial tools provided by the Financial CHANGE Program and the Financial Education Center.
7. Refrain 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. I understand that I am not expected to give legal advice or perform financial steering, and in fact I am prohibited from doing so. Neither the Financial Education Center nor the University of Wisconsin shall be held liable if I give specific stock, investment, or banking advice which causes harm to a participant(s) in the Financial CHANGE Program.

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**Coach's Name**

**Signature**

**Date**



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## FINANCIAL CHANGE PROGRAM PARTNER AGREEMENT

The Financial CHANG.E Program is designed to help you (the Partner) and families reach your goals. You will work with and coach to accomplish the goals within the following guidelines:

*As a partner in the Financial CHANGE 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 not 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. This means being on time and notify my coach as soon as possible if I need 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 the Dane County Extension Financial Education Center responsible for any consequences resulting from my choices or actions.
7. I may be removed if I do not to all guidelines and expectations of the Financial CHANGE Program.

*I understand that the goals of the Financial CHANGE Program are as follows:*

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

I 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 service participant/partner for the Financial CHANGE Program, I will not receive legal advice or professional financial services. My financial coach will be there to support and encourage me during the term of the Program, and I will participate in informational workshops on financial matters. Ultimately, I am responsible for my actions. Neither Dane County Extension Financial Education Center nor the University of Wisconsin shall be held liable for the stock, investment, banking, or other financial decisions I make as a result of this program.

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**Partner's Name**

**Signature**

**Date**

