**Financial Coaching Contact Record**

Client Name: \_\_\_\_\_\_ Date: ­­­­ \_\_\_\_

Coach Name: \_\_\_\_\_\_ Time Spent: \_\_\_\_

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Contact Type** | | | **In Person □** | **Phone □** | **E-mail □** | **Letter □** |
| Initiated by (Circle one): Client Coach Other: | | | | | | |
| **Meeting Type:** | | | | | | |
|  | Initial: Home / Office |  | | | | |
|  | Maintenance Check-in |  | | | | |
|  | Final: Home / Office |  | | | | |
|  | Other (describe) |  | | | | |
| **Main Discussion Topics** | | | | | | |
|  | | | | | | |
| **Referrals/Resources** | | | | | | |
|  | | | | | | |
|  | | | | | | |
|  | | | | | | |
| **Follow Up for Next Meeting:** | | | | | | |
|  | | | | | | |

*Created by: Peggy Olive, UW-Extension Richland County, 2009.*

*Adapted from: EARN Wealthcare Client Contact Record, Wealthcare Coach Training, EARN 2008*