A 4 Financial Coaching Model



University of Wisconsin-Extension				
Alliance	Agenda	Awareness	Action	
 Establish trust through initial and ongoing relationship building Discuss how to work together – responsibilities of coach and client, confidentiality, providing education or referrals Determine coaching schedule – meetings, check-ins, celebrations, closure Sample Alliance Questions: What's your dream? What keeps you motivated? How do you know when you're stuck? What do you need from a coach? What would you like to celebrate? 	 <u>Coach's Role</u>: Review required sponsoring agency materials – budget worksheet, credit report information, pre-/post-surveys Clarify goals of agency – not goals of coach Disclose accountability required by agency for coach and client Facilitate goal refinement <u>Client's Role</u>: Share long term goals and specific goals for each coaching session <u>Sample Agenda Questions</u>: What would you like to get out of coaching today? What's important about that? What will be different at the 	 Explore what's important to client, competencies, challenges, resources Topic areas include values, hopes, resources, barriers, strengths Sample Awareness Questions: How important is this to you? If the problem were solved, what would be different? Where do you feel stuck? If anything were possible, what would you like to see happen? If you knew you couldn't fail, what would you do? On a scale of 1-10, how much energy can you devote to this? What advice would you give someone in your situation? 	 Move from exploration to planning Review supports, resources needed for client's success Discuss access to structures, prompts, reminders Sample Action Questions: Where do you go from here? What's your first step? When would you like to do that? What support do you need to be successful? What might get in your way? How will you know you're on track? What needs to be in place for you to move forward? How would you like to check in on your progress? 	
Alliance Agenda Action A 4 Awareness	 end of our meeting? What would you like to focus on today? What's on your mind? What's your main concern? What do you really want? How will you know if this session has been helpful? What would it take for you to feel you're closer to your goal? 	4 Coaching Sessions Refining Deepening Forwarding Launching A Coaching Sessions addres susta for th the c increa goals prepa after	for these 4 sessions includes defining the client's short and long term goals, increasing awareness surrounding the goals and desired behavior change, and preparing for self-sustaining behaviors	

For more information: fyi.uwex.edu/financialcoaching