

Working with a Financial Coach Checklist & Guide



Before your first meeting with your financial coach, go through the steps listed below to maximize the efficiency of the coaching process. Doing so will help the coach better understand your needs and goals, and develop a plan with you to help you work toward greater financial wellness.

Reflection

Do a light personal assessment of your financial situation and be prepared to share this information with your coach. List any challenges or areas where you feel you want to improve.

Think about your main financial goals. These goals will change over the coaching process; however, just having a rough idea will help you progress faster.

Consider upcoming financial needs. Are you planning any new additions to the family, do you have large purchases coming up, or are there other areas you need to prepare for?



Information

Start saving all your statements (bills, accounts, etc.) and keep them in a secure location. Doing this will ensure that you have the information your coach needs without having to wait for the next statement.

Gather any other financial information, including the details of your will, beneficiaries, and other items that don't give you regular monthly statements.

Rigor

Think about how much time you can dedicate to the coaching process. To what pace and timeline can you commit? Knowing this will help the coach customize the program based on your time needs.

Consider your level of commitment and what changes you may be willing to make to achieve your financial goals and greater financial security.

Highly Committed

Wanted

Unsure



Expectations

List your expectations for working with a coach. Think through your outcome goals and the role you want your coach to play to help you achieve them.

What type of coaching style would motivate you best? Are you looking for that drill sergeant style who's pushing you, a motherly style that offers compassionate inspiration, or something else? Sharing these ideas will help the coach serve you.

