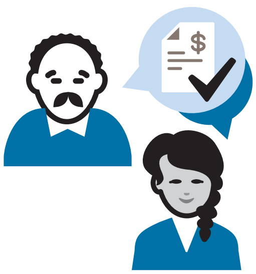
Coaching readiness checklist



Financial coaching consists of one-on-one sessions between a client and a coach. The purpose of these sessions is to help you achieve your financial goals by addressing immediate concerns, providing tools, resources and referrals and support and encouragement.

☐ **I am interested in money coaching, however; right now, there is something out of the ordinary going on in my personal life that might prevent me from attending all of the coaching sessions.**

If you have the time and are interested in receiving financial coaching, please answer the questions below.

Yes	No	
☐	☐	When I look at my finances, I notice a gap between where I am now and where I want to be. I'd like to learn how to manage my money better to close this gap.
☐	☐	I'm open to ideas and new ways of doing things to improve my financial situation.
☐	☐	I am willing to reflect on past money decisions I have made and discuss them with the coach.
☐	☐	I would like to learn about tools, resources, and concrete approaches to set money goals.
☐	☐	I am prepared to devote the time to make money coaching work. This includes meeting my coach once a month for one hour and follow up in between if needed.
☐	☐	I see money coaching as an investment in my personal growth.
☐	☐	I feel 'stuck' and recognize the need to focus on my financial situation and set goals.
☐	☐	I understand that in coaching, the "participant does the work," not the coach.
☐	☐	I understand that my financial coach will guide me through money management basics. If I find it difficult to share and discuss with my coach, I will let my coach know immediately so we can take action to improve the situation.

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For staff

- Upon completion of client readiness form, be sure to refer the client to resources such as the Benefits wayfinder and Trove.
- The client has indicated they are not ready for financial coaching at this time and a follow up is required. Date for follow up:

Resources

- Prosper Canada's Benefits wayfinder: https://benefitswayfinder.org/
- Trove: https://yourtrove.org/

Notes