

## **Community Coach Pilot Program Description and Agreement**

**Description:** The Financial Fitness Center (FFC) offers individuals and families the opportunity to work one-on-one with a trained Financial Coach. Financial Coaches will help clients create and reach their financial goals which will build a path to overall financial stability and provide clients a better understanding of how to manage the daily interaction between their finances and personal lives. As the FFC explores methods to implement a Volunteer Financial Coach program, we are seeking individuals to serve in the three month Community Coach Pilot Program.

**Responsibilities:** The Community Coach Pilot Program is a three month commitment including:

- Attend the Community Coach training on Monday, December 2, 11:45 a.m. – 1:15 p.m.
- Serve as Community Coaches to no more than three (3) clients at a time, meeting monthly to provide encouragement and accountability to the client in meeting their personal financial goals, including:
  - Empower clients to identify and prioritize their financial goals.
  - Help clients to 1) understand their expenses, 2) create a budget/intentional spending plan, and 3) track expenses on a month-to-month basis.
  - Educate clients on the importance of emergency savings funds; empower clients to start an emergency savings fund.
  - Connect clients to necessary resources in order to:
    - Understand their credit history
    - Reduce debt
    - Encourage banking relationships
    - Assist client in their day-to-day activities related to their financial goals
- Provide feedback to the FFC Staff on the successes and challenges experienced working with clients. The FFC will host monthly feedback sessions in the months of January, February, and March.

**Skills:** Essential skills for the Community Coach include:

- Understanding of basic personal finance and budgeting
- Highly organized and resourceful
- Understanding of clients' various needs and life experiences, providing empathy as appropriate

### **Community Coach Volunteer Agreement**

The Financial Fitness Center strives to provide quality financial coaching in a confidential and unbiased manner. To accomplish this, our financial coaches agree to:

- Maintain confidentiality about client's personal financial issues and any other personal matters shared during financial coaching sessions.
- Be an unbiased source of financial information and not solicit any paid service for the company, organization or field in which they work.
- Not distribute business cards or materials promoting their employment or any of their employer's products; or ask the client to distribute any of the above materials.
- Not use client information such as telephone numbers and/or addresses for use outside of financial coaching (with or without permission of the client).
- Disclose any perceived conflict of interest to the Financial Fitness Center Director.
- Act strictly in the best interest of the client, not to take actions or make decisions on the client's behalf, and to be respectful of the actions and decisions taken by the client.
- Provide regular updates to the Financial Fitness Center Director on the progress of clients.
- Complete regular updates on client interactions in the online evaluation tool.

I acknowledge and agree to abide by the Financial Fitness Center Volunteer Agreement.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature, Date

\_\_\_\_\_  
Financial Fitness Center Staff Signature