

“Repack Your Financial Bags for Greater Financial Well Being”: The Coach Experience



This workshop is part of a series is made possible by a grant from the FINRA Investor Education Foundation through a partnership with United Way Worldwide, and is presented by Metro United Way, Louisville Metro Community Services, the Center for Non Profit Excellence, Bellarmine University, the Louisville Urban League, Apprisen, Fulton180 Coaching, Consulting, and Training Projects, and Quantum Communications.

“Repack Your Financial Bags for Greater Financial Well Being”: The Coach Experience

Discover what’s in your current financial traveling bags you need to develop, ditch or discover for a better and more satisfying journey. No one else has your exact background, history or experiences with money. Your financial reality is unique to you. Treat it that way. Be open to thinking and acting outside your comfort zone. Experience and evaluate the value of financial coaching for your unique life experiences.

Workshop Bonus: Bring your calendar! Workshop participants will have an opportunity to schedule a free individual financial coaching session with a certified coach to continue the conversation on a more personal level.

Objectives:

1. Participants will gain a better understanding of their unique financial education experiences, knowledge, and skills that form the framework for the financial decisions they make daily.
2. Participants will experience, evaluate and determine personal interest and preparedness for engaging financial coaching as a personal development strategy in financial planning and goal setting experiences.
3. Participant will take away at least one tool to track and measure progress on their financial goals.

Tell your story with money in **5 words or less.**

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5-2

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5-3

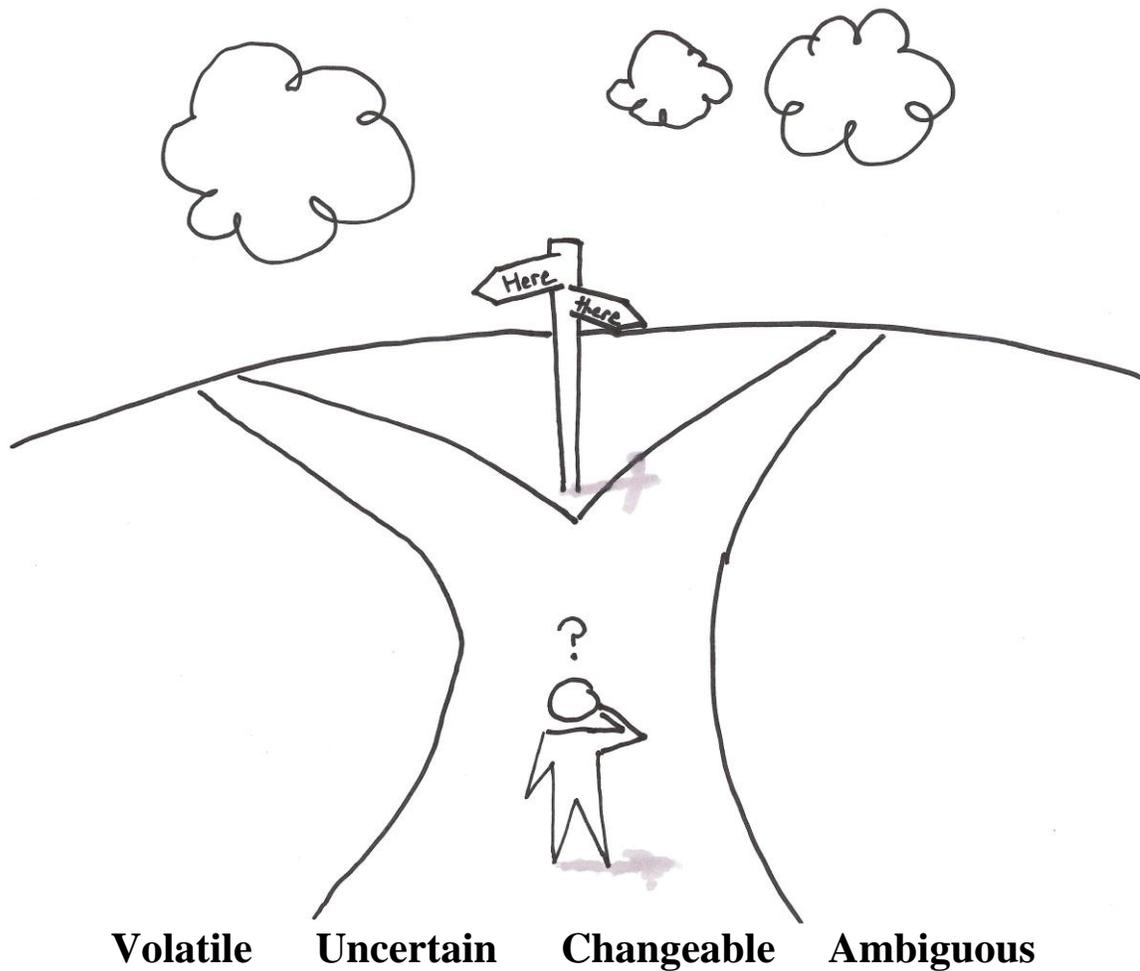
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5-5

Your Path to Financial Capability and Financial Well Being



Your Financial Capability Road with Financial Coaching Conversations

Just-in-time solution conversations at your point of interest, opportunity or need!

The most effective way to reinforce new behaviors and skills.

Invitations to explore and discover.

Creates awareness leading to designing actions, planning and goal setting with personal systems for managing progress and accountability.



WHICH WAY YOU HEADED?

Break Through Coaching Experiences

Qualities Characteristics

Value Experience
Confident Confidentiality
Partnership Success
Just-in-Time Solutions
Real-time Data-Insights
Relationship Not Program
BYOW – Bring Your Own Work
Agenda You

Ethics
Agreements
Trust
Presence
Active Listening
Powerful Questions
Direct Communication
Creating Awareness
Designing Action
Planning and Goal Setting
Managing Progress and Accountability
International Coach Federation (ICF) Core Competencies
www.InternationalCoachFederation.org

Lean into these Conversation Skills

Perspective – Curious for YOU

Language – Reframe with AND

Skill – Listening by 4's

Mastery – Question AWE!

Financial Coaching

Read each of the following statements then decide which statements best describe what financial coaching IS and what it IS NOT. Mark each statement in the column that represents your choice.

IS:

IS NOT:

- | | | |
|--------------------------|----------------------------------------|-----------------------|
| <input type="checkbox"/> | Collaborative, egalitarian, respectful | <input type="radio"/> |
| <input type="checkbox"/> | A challenge for self-limiting beliefs | <input type="radio"/> |
| <input type="checkbox"/> | Financial education | <input type="radio"/> |
| <input type="checkbox"/> | Relationship-based goal attainment | <input type="radio"/> |
| <input type="checkbox"/> | Coach-directed accountability | <input type="radio"/> |
| <input type="checkbox"/> | An alliance for action | <input type="radio"/> |
| <input type="checkbox"/> | Financial advising | <input type="radio"/> |
| <input type="checkbox"/> | Facilitated self-directed learning | <input type="radio"/> |
| <input type="checkbox"/> | | <input type="radio"/> |
| <input type="checkbox"/> | | <input type="radio"/> |
| <input type="checkbox"/> | | <input type="radio"/> |

Unpack Your Travel Bags

Financial Life Lived - Experiences - Messages



Unpack Your Travel Bags

Financial Education – Life Curriculum PROCESS



- Think of financial education as a *process* of learning not the *product* of what you learn.
- Think of financial education as the *curriculum*, the *individual learning plan* you create over a life time.
- Think of financial education as the learning *process* you put in place as a financial consumer *to improve your awareness and understanding of financial concepts, products, risks, and systems that interact with your financial well being.*

Unpack-Repack Your Travel Bags Financial Literacy – Knowledge – Skills



- Think of financial literacy as the *output*, the *result* of your financial education process.
- Think of financial literacy as the “*thinking power*” you internalize from concepts and principles you learn.
- Think of financial literacy as the *skills you develop* when you use and apply knowledge to make informed financial decisions.

Top 3 Repack Your Travel Bags



<p style="text-align: center;">Financial Life Lived</p>  <p style="text-align: center;">Messages - Experiences</p>	<p style="text-align: center;">Financial Education</p>  <p style="text-align: center;">Process - Curriculum</p>	<p style="text-align: center;">Financial Literacy</p>  <p style="text-align: center;">Knowledge – Skills</p>
	<p>What do you need to ditch?</p>	
<p>What’s worth taking...</p>	<p>What’s worth keeping...</p>	<p>on the next trip leg?</p>

New Travel Bags
Financial Capability and Financial Well Being
Actions – Planning – Goal Setting – Managing Progress – Accountability



"I always knew I'd amount to something.
I guess I should have been more specific!"



Specific, Observable, Measurable



Motivational, Internal, Optimum



Achievable (Is it?)



Relevant to the Main Issue



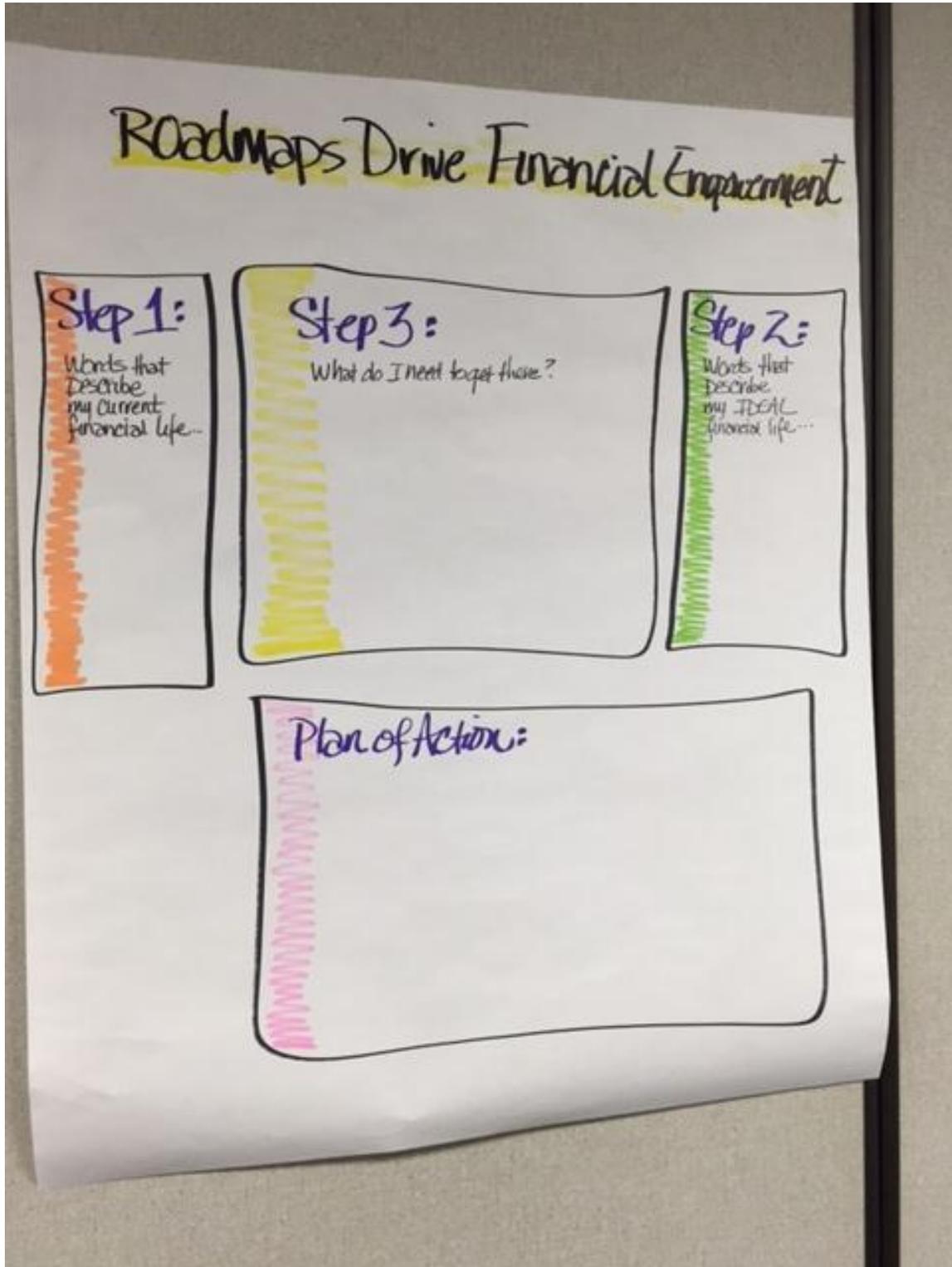
Trackable, Progress Over Time

S – T – R – A – M

New Travel Bags

Financial Capability and Financial Well Being

Actions – Planning – Goal Setting – Managing Progress – Accountability



New Travel Bags

Financial Capability and Financial Well Being

Actions – Planning – Goal Setting – Managing Progress – Accountability

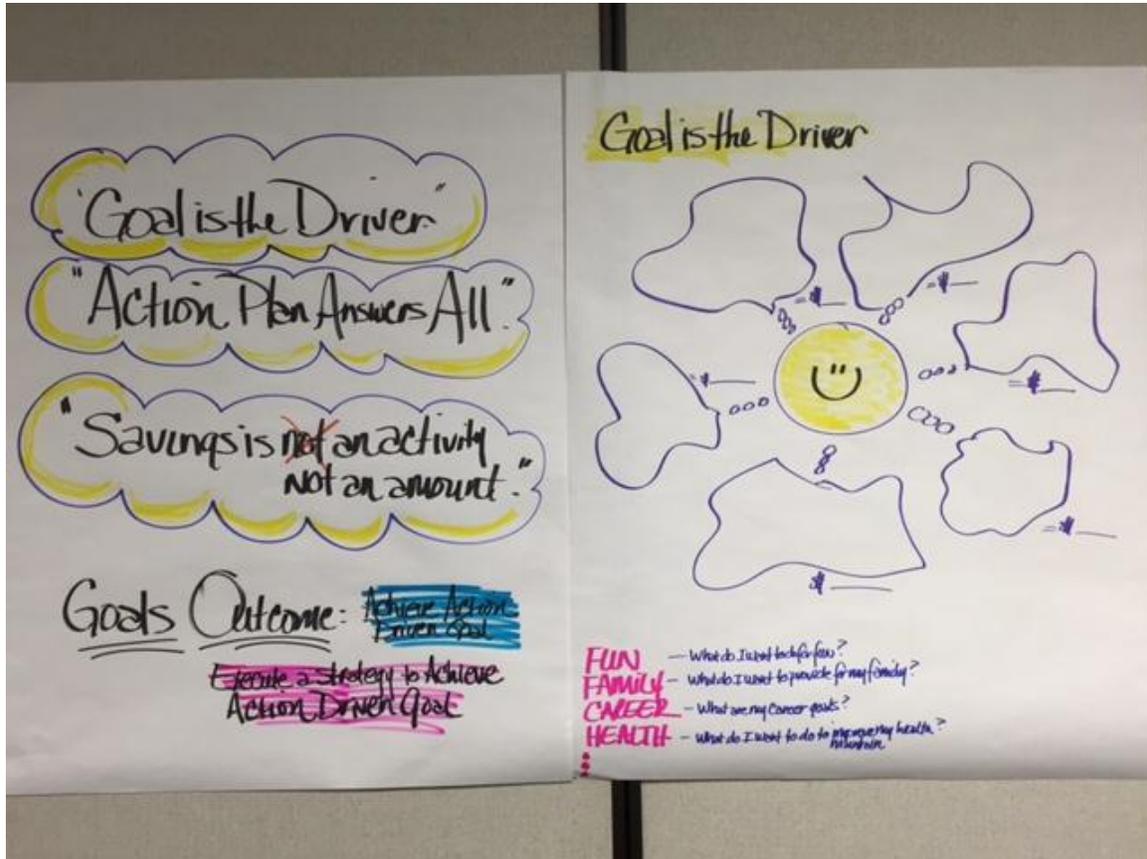


Repack #3 GOAL is the DRIVER!

New Travel Bags

Financial Capability and Financial Well Being

Actions – Planning – Goal Setting – Managing Progress – Accountability



Turn Your Financial Capability into Financial Well Being! Financial Coaching Conversations



By attending the “**Repack Your Financial Bags for Greater Financial Well Being**”: **The Coach Experience** workshop, you are eligible to sign up and receive a free 45 minute individual bonus financial coaching session. Schedule your session with Janet M. Fulton, ICF, ACC certified coach before you complete the workshop. You may choose in-person or phone coaching conversations.

Please note the following session protocols.

→ **Phone Sessions** Attend your session on time. You initiate the call by dialing 502-523-1610 on the day and time listed below. Janet will wait for your call for 10 minutes from the start of your appointment time. If you do not call in that time frame you forfeit your coaching conversation. If you need to reschedule your session please provide 24 hours notice prior to your appointment.

Phone Session: Day/Day _____

Phone Session: Time _____

→ **In-Person Sessions** Attend your session on time. All in-person coaching conversations will take place at Louisville Metro Government Center, 810 Barret Avenue, Conference room #348. Janet will wait for you for 10 minutes from the start of your appointment time. If you do not arrive within that time frame you forfeit your coaching conversation. If you need to reschedule your session please provide 24 hours notice prior to your appointment.

In-Person Session: Day/Day _____

In-Person Session: Time _____

Tell a Better Financial Story!
Make time for a Financial Coaching Conversation!