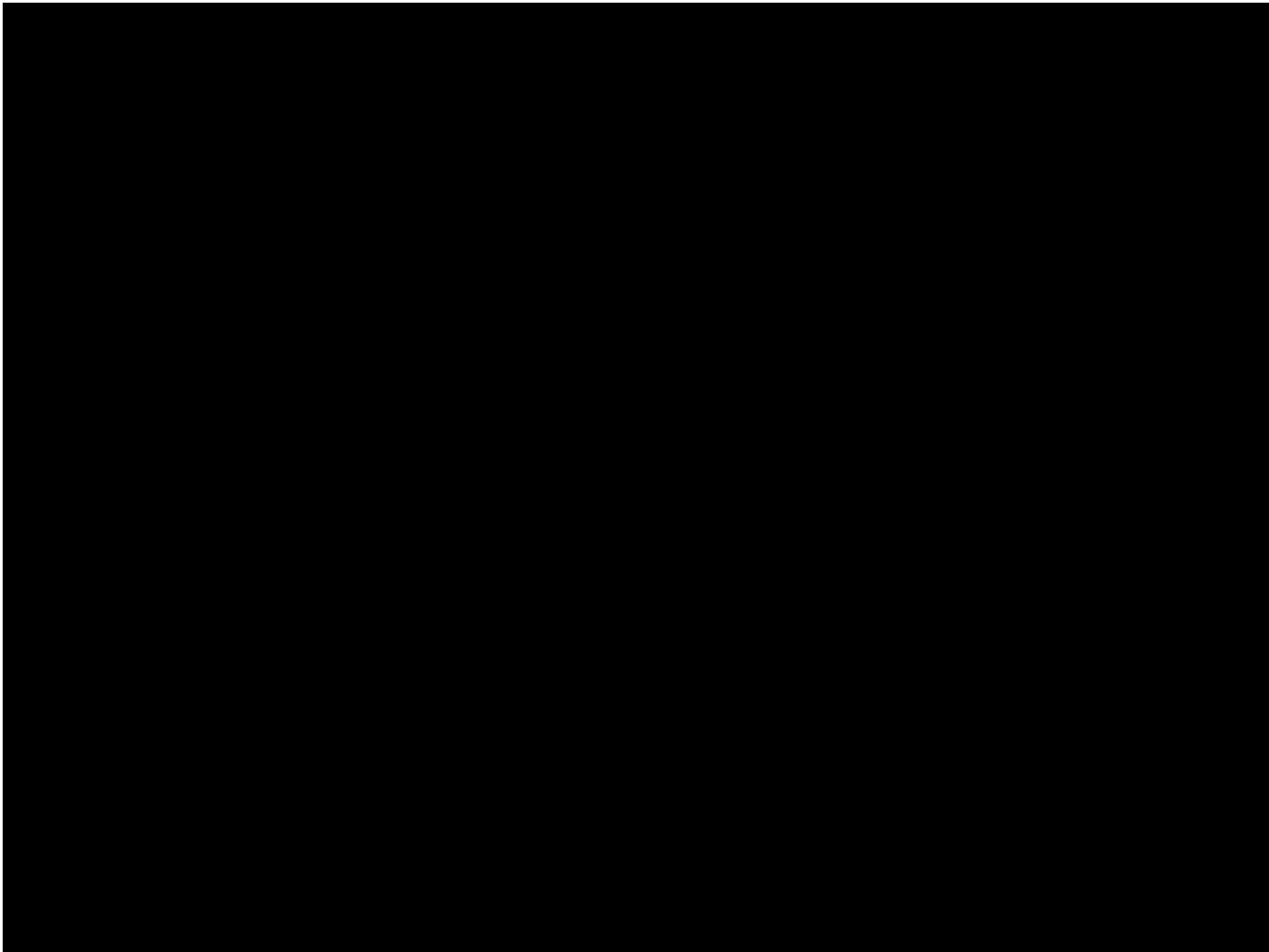


Integrating

**FINANCIAL
COACHING**

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HOW COACHING WORKS

Coaching Philosophy

- Coaching is partnering with clients in **thought-provoking and creative process** that inspires them to maximize their potential.
- People are **naturally creative, resourceful and whole.**
- Clients set **own agendas/goals.**



Coaching Fundamentals



- Coaches **dance in the moment.**
- Clients responsible for the behavior **change.**
- **Framework** helps clients discover, vision, action plan and be accountable.

Ways to Integrate

- Program
- Framework
- Philosophy
- Skills



Tax-Aid in San Francisco



- Volunteer model
- Program goal is to help clients track spending, prepare basic budget and reach initial savings goals
- 6 months, 5 meetings
- Coaches check in between meetings

MEDA in San Francisco



- Service-integration model
- Asset development staff serve as part-time coaches
- Coaching is highly variable

Unity Council in Oakland

- Part of financial empowerment program
- Coaches are contractors and staff
- Clients first go through budgeting and goal-setting process with a counselor
- 1:1 coaching is supplemented by quarterly meetings



The mission of the Unity Council is to help families and individuals build wealth and assets through comprehensive programs of sustainable economic, social, and neighborhood development.

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