

Please sit in the following sections based on the color of your sticker.

Front



# Launching Texas' New Financial Coaching Platform

*My values determine how I spend my time; my next career decision; and how I spend my money.*



# Financial Coaching

Financial Coaching is a client-driven process in which individuals and families work to reach personalized goals related to improving their financial well-being. Coaches should not provide expertise on their clients' financial issues, but offer tools and resources, encouragement, and monitoring throughout the process of self-directed behavior change

-RAISE Texas

# Coaching Model



# Values

- Listen to each statement.
- If this statement applies to you please stand up.
- Keep track of how many times you stood up.

# Life Values Quiz

# Conflicting Values Conversation

- What is one true belief you have about money?
- In what ways do your values impact how you spend your money?
- How do your values impact the way you work with people?
- What can happen if you try to impose your values onto your clients?



# Contact Information

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