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