**FINANCIAL COACHING PROGRAM PARTICIPANT AGREEMENT**

Accounting Aid Society’s financial coaching program is designed to help individuals and families achieve their desired financial goals. Each participant and coach team (Team) will work together to accomplish the goals within the following guidelines:

As a participant in the Financial Coaching Program, I understand that:

1. Attendance at all program and regularly-scheduled meetings is required.

2. All information about my financial situation will be held in strict confidence.

3. My coach is a financial educator and that he/she cannot give me financial or legal advice, but

can only present me with various resources and options, coaching, and encouragement.

4. My coach is a volunteer and does not receive any financial compensation for assisting me.

5. I must respect my coach’s time and be on time and prepared for all scheduled meetings. If I

have a conflict, I will give my coach ample advance notice to reschedule any appointments.

6. I assume total responsibility for the decisions I make about my finances and will not hold the

Financial Coach or Accounting Aid Society responsible for any consequences resulting from my choices or actions.

7. I may be removed from the program if I do not adhere to all guidelines and expectations of

the Financial Coaching Program.

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Partner’s Name Signature Date