**Financial Coaching Program Coach Contract**

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

**As a Coach, you agree to**:

1. Work with your client for a period of at least six months to provide guidance, support, encouragement and accountability as he/she works to accomplish identified financial goals. After six months have passed, coaches can agree to extend the relationship on a month-to-month basis.

2. Refrain from any judgment of your partner or their financial situation.

3. Respect the confidentiality of your partner and others; furthermore, do not retain any copies of their personal financial information.

4. Attend all required meetings: including orientation, group sessions and graduation.

5. Complete and return all required forms accurately and promptly, especially monthly session reports.

6. Not accept any compensation from third parties or clients.

7. Abstain from using your position as a Financial Coach for your own personal or business purposes.

I understand that financial coaching is for educational purposes only, not for soliciting or providing professional counsel to partners.

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Coach’s Name

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Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

**Financial Coaching Program Client Contract**

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

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

1. Attendance at all meetings with my coach is required. I will work with my coach for a minimum of six months and will give my coach advance notice when I wish to end the relationship.

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. She/ He does not receive, and will not accept, financial compensation for assisting me.

5. I must respect my coaches’ 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

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Signature

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Date