



Moneytalk Financial Foundations, Inc

A 501(c)(3) Non-Profit Charitable Organization

www.moneytalkff.org

P.O.Box 860184, Shawnee, KS 66226

913-538-1465

EIN=46-3216486

Financial Coaching Agreement

This financial coaching agreement is between _____ and Moneytalk Financial Foundations (aka MTFF) effective as of ___/___/_____ for the duration of _____ months. The monthly coaching amount will be \$_____ to be paid on the _____ day of the month through automatic payment.

Client agrees to: (initial each statement)

- _____ Attend one or two coaching sessions per month for the duration of the agreement
- _____ Complete, or make progress toward completing, the action items resulting from each coaching session prior to the next meeting including, but not limited to: setting and achieving goals, creating a monthly budget, attending recommended workshops, and participating in regular support opportunities as available
- _____ Complete the registration process and pay the coaching rate for workshops
- _____ Contact their financial coach with any financial questions or financial challenges as they arise
- _____ Do their best to stop or change self-defeating behaviors
- _____ Continue, or begin, attending a local Christian church of their choosing
- _____ Provide their financial coach with complete information as accurately as possible
- _____ Provide MTFF with information needed to provide measurable results for funding purposes. (Results will only be shared in summary)
- _____ Pay the agreed upon amount through automatic payment on the approved date above
- _____ Contact their financial coach at least 30 minutes in advance if a session is to be cancelled out of respect for the coach's time
- _____ Allow MTFF to collect \$10 no show fee through saved payment information if financial coach is NOT contacted prior to the scheduled start of a coaching session

Moneytalk agrees to:

- Provide a financial coach to meet with the client once or twice per month
- Keep information confidential and restricted to the financial coaching team, unless illegal activity is found or law enforcement has a valid need to know as approved only by the executive director
- Accurately report coaching agreement payments to the credit reporting agencies with the intention of providing current positive activity and improving the client's credit score
- Complete MTFF's action items, document meetings, and email action items to client
- Award need-based scholarship toward cost of coaching and workshops based on organization's policy

Signed

Client _____

Moneytalk _____

Date: _____

Title: _____