

COOPERATIVE EXTENSION

**Richland County UW-Extension** UNIVERSITY OF WISCONSIN-EXTENSION

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**UW-Extension Financial Coaching Program**

The UW-Extension Financial Coaching program wants to help individuals and families reach their personal financial goals. Program participants and financial coaches will work together as a team toward these goals.

The Financial Coaching program lasts anywhere between 3 - 6 months, depending on each individual’s goals. All participants will be asked to complete a financial survey before starting the program and again when their coaching finishes up.

**Here are a few things to keep in mind about the Financial Coaching Program**:

1. All information about my financial situation will be held in strict confidence.
2. I will work with my financial coach to determine my personal financial goals and steps to reach those goals.
3. My coach is a financial educator and he/she cannot give me financial or legal advice, but can help me in understanding issues, finding resources, and setting my financial goals.
4. My financial coach and I will touch base about once a month. If I have a conflict with a set meeting time, I will get in touch with my coach to reschedule any appointments.
5. I will obtain a free credit report. I can choose to share or not share this report with my coach.
6. My coach cannot make decisions for me or make contact with creditors on my behalf.
7. I’m responsible for the decisions I make about my finances and for whatever results from my personal choices or actions.
8. If I can’t continue to meet with my financial coach to finish the program, I will contact my coach to talk this over. If I don’t follow through on appointments with my coach, I can be dropped from the Coaching Program.

University of Wisconsin, United States Department of Agriculture and Wisconsin Counties Cooperating.

University of Wisconsin-Extension provides equal opportunities in employment and programming, including Title IX and ADA.