**UW-Extension Financial Coaching Program**

**Partner Agreement**

The UW-Extension Financial Coaching Program is designed to help you (the Partner) reach your goals. You will work with the coach to accomplish the goals within the following guidelines:

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

1. Attendance at all one-on-one meetings is expected.

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

3. My coach is not a financial expert and cannot give me financial or legal advice, but can only present me with various resources and options, coaching, and encouragement.

4. I must respect my coach’s time. This means being on time and notify my coach as soon as possible if I need to reschedule any appointments.

5. I assume total responsibility for the decisions I make about my finances and will not hold the Financial Coach or the UW-Extension responsible for any consequences resulting from my choices or actions.

**I understand that the goals of the Program are as follows:**

• Help me to understand issues, resolve problems, and pursue my goals

• Provide me with information, education, and guidance so I am able to make decisions on my own behalf.

• Help me identify and use resources to address my needs and promote my financial wellness.

I understand that my Coach will not make decisions for me or make contacts to creditors or others on my behalf. Making decisions and taking action will be my responsibility. I understand that as service participant/partner for the Program, I will not receive legal advice or professional financial services. My financial coach will be there to support and encourage me during the term of the Program. Ultimately, I am responsible for my actions. The University of Wisconsin shall not be held liable for the stock, investment, banking, or other financial decisions I make as a result of this program.

Partner’s Name Signature Date

Coach’s Name Signature Date

Adapted June 2012 Joan Sprain

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