A Complete List of all the Documents, Handouts, Templates Provided in the Financial Coach Academy

These are not provided as white label docs. You will need to recreate them and add your own logos and branding. We encourage you to use them as inspiration and make them perfect for your clients.

Documents For Your Work with Clients

A Client's First Experience Working With You

- Quick Audit Sample Emails for Leads and Prospects
- Discovery Session Sample Client Agreement
- Discovery Session Sample Emails for Clients
- Discovery Session Sample Questionnaire
- Discovery Session Sample Prep Work - Personal & Business Finances included!
- Discovery Session Sample Slide Deck
- Post-Discovery Session Sample Emails for Clients
- Post-Discovery Session Sample Feedback Form

Building Long-Term Relationships with Clients

- Coaching Program Sample Flyer
- Coaching Program Sample Skills Tracker
- Identifying Your Three Values Sample Client Exercise
- Emergency Budget Sample Client Exercise
- Financial Principles Sample Client Exercise
- Net Worth Sample Client Exercise
- Savings Rates Sample Client Exercise
- Various Planning Ahead Sample Client Exercises
- Annual Expense Calendar Sample Client Exercise
- Goal Setting Strategies Sample Client Exercise
- Coaching on Clients Using Credit Cards Sample Client Exercise
- Taking Inventory Sample Client Exercise
- Side Hustles Sample Client Exercise
- Managing a Variable Income Sample Client Exercise
- Coaching the Caretaker Sample Client Exercise
- Money Mindset Sample Client Exercises
- Active & Passive Learning Sample Client Exercise
- Legacy Drawer Sample Client Exercise
- Couples with Uneven Power Dynamic Sample Client Exercise
- Couples Who Separate Finances Sample Client Exercise
- Business Owners With Insufficient Revenue Sample Client Exercise
- Clients with Expenses Far Exceeding Income Sample Client Exercise
- Coaching Program Sample Client Agreement
- Coaching Program Sample Emails
- Coaching Program Sample Client Session Tracker
- Coaching Program Sample Testimonial Release Form

The Plan Ahead Method™

- The Plan Ahead Method™ Budget Template

Marketing Your Coaching

- Referral Partners Sample Flyer
- Referral Partners Sample Privacy Release Form
- Referral Partners Sample Webpage

BONUS: Advanced Programming

- Periodic Coaching Sample Agreement
- Periodic Coaching Sample Pre-Session Questionnaire
- Daily Money Management Sample Landing Page
- Daily Money Management Sample Flyer
- Daily Money Management Sample Emails
- Daily Money Management Sample Client Agreement
- Daily Money Management Sample Prep Work
- Daily Money Management Sample Billable Template

BONUS: Advanced Marketing

- Sample Speaker Kit
- Signature Presentation Sample Slide Deck
- Signature Presentation Sample Newsletter Sign-Up Form
- Signature Presentation Sample Deliverables
- Sample Media Pitch Email
- Sample HARO Response Email

BONUS: Corporate Wellness

- Corporate Wellness Sample Landing Page
- Sample Capabilities Briefing Slide Deck
- Sample Needs Discovery Questions
- Sample Workbook
- Sample Financial Stress Assessment
- Sample Strategic Debrief
- Sample Proposal

Documents For Coaches' Eyes Only

› Clarity On Who You Are and Who You Serve

- Find Your Why
- Story Structures That Inspire and Influence
- T he Golden Circle
- Your 7 Signature Stories
- Interview with a Professional Storyteller on Crafting Your Why Story
- The Vision You Have for Your Business
- What Kind of Business Do You Want?
- Find Your Dream Client Profile
- Find Your Clients' SUP2ER* Problems (*Not a typo!)
- Choosing a Business Name
- Interviews with an Attorney on Legal Protections, Insurance, and Contracts
- Interview with a CPA on Business Taxes and Accounting

› A Client's First Experience Working With You

- Client Journey Roadmap
- Tech Tutorial for Scheduling Software
- Tech Tutorials for Tracking Leads, Prospects, Clients, and Referral Partners
- Quick Audit Framework
- Quick Audit Example Script
- Quick Audit Note-Taking Sheet
- Discovery Session Framework
- Design Your Discovery Session
- **FULL Recording of Discovery Session Example (2 hours)**
- Tech Tutorials for Questionnaires
- Tech Tutorial for Sharing Google Docs with Clients

› Building Long-Term Relationships with Clients

- Design Your Coaching Program(s)
- The Ripple Effect
- Four Key Roles of a Financial Coach
- Client Exercise Ideation
- Content Creation Framework
- Effective Coaching Questions
- Content Library
- Research Template
- Video Trainings for All 20+ Above-Mentioned Client Exercises
- Tech Tutorials for Sending & Signing Coaching Agreements
- Recurring Payment Processor Instructions
- Client Revenue Tracker

› Selling with Integrity

- Sample Scripts
- Bridging the Gap
- Mindset of Sales
- Energy of Sales
- Overcoming Specific Objections: A How-To Guide
- Scripts and Objections
- Practicing Your Sales Skills

› The Plan Ahead Method™

- The Plan Ahead Method™ Budget Demo
- Tutorials for the Plan Ahead Method™

› Marketing Your Coaching

- List of Networking Groups
- Identify Your Ideal Referral Partners
- Prepare for One-to-One and Networking Meetings
- Follow Up After One-to-One and Networking Meetings
- Plan Your Social Media Profile
- Plan Your Social Media Content
- Interview with Experienced Financial Coaches Achieving Social Media Success
- Creating a Killer Website
- Tech Tutorial for Graphic Design

› BONUS: Thinking Like a CEO

- Taking Action in Your Business
- My Future Roadmap
- Key Performance Indicators for Your Business
- Being Intentional With Your Business
- Time Management Tips & Tricks
- Start-up Business Expenses
- Phase II Business Expenses
- Hiring Your First Team Member
- Employment Contract
- Interview Questions
- Grow Your Team Using Kolbe
- How to Delegate
- Downloadable Mindset Coaching Audio Files
- Pep Talk Videos

› BONUS: Advanced Programming

- Client Success Path
- Scale Your Financial Coaching Business
- Design Your One-to-Many Offer
- Daily Money Management Client Journey Roadmap

› BONUS: Advanced Marketing

- Components of Your Signature Presentation
- Delivering Your Signature Presentation
- Simple SEO Links and Resources
- GIF Training Links

› BONUS: Corporate Wellness

- Corporate Wellness Flow Sheet
- Key Players
- Determining Your Workplace Niche
- Formula for Building a Dynamic Workshop
- Landing Your First Client
- Developing Partnerships with Corporate Clients
- Upleveling Your Financial Wellness Program

Bonus Materials

- Module rubrics to show you the overarching themes of each module and lesson - better organized and more streamlined than ever before!
- Action steps designed to take you through all stages of building your coaching business from learning the concepts to launching your practice!
- Recordings (audio and video) of group coaching calls with lists of questions asked during each call