



My Core Beliefs, Philosophies and Expectations in Coaching

I believe:

- that life is precious. Spending time doing what you love, what is rewarding and what is inspiring is part of my work with you. In my view, the majority of people in our society and culture neglect to align their lives and finances with what rewards and inspires them.
- that the money is “the means, not the end”. While money can assist the achievement of your goals, often there are other ways to achieve these goals, which may have little to do with personal finance; instead, they are related to astute and conscious choices. Pursuing these non-financial motivations with money goals often leads to misspent resources.
- that everyone has Unique Abilities; and we utilize the unique ability concept to broaden client perspective, self-awareness and life pursuits.
- in open and honest communication. Communication is vital to the success of our work together and our partnership process.
- our relationships are meant to be filled with joy, vitality, meaning, and passion. And, I believe that working with me will open pathways for other relationships in your life to experience the same results.

My Commitments to You:

- to get to know you, your personal goals, your struggles and challenges around money, and to tailor my recommendations so that they help you create an abundant and rewarding personal and financial life.
- to treat all of your information in the strictest of confidences, whether written or verbal.
- to take full responsibility for my behavior. If you have a situation or experience that requires attention, I respond thoughtfully. I request you notify me of any issue so that I have the opportunity to address your concerns.
- to treat you with respect, professionalism, honesty, and to maintain a nonjudgmental attitude toward the goals and information you provide me.
- to be fully present for our scheduled calls and accessible to you by e-mail; during business hours I will respond to your inquiries.
- to act with the highest integrity and honesty at all times, even when the conversation may create discomfort. If we encounter what seem to be unrealistic expectations or a pattern of living beyond one’s means, or a disconnect between stated goals and decisions, I will bring it to your attention.
- to willingly share my wisdom that I have acquired through years of experience with my clients.
- to be open to learning all that I need and want to learn in our relationship together.
- to your realization of your personal and financial goals. As long as we work together, I will be deeply committed to your success.

Your Commitments to Me:

- I expect you to be honest and forthcoming about your personal and professional goals, and about your current financial situation. Only in this way you will be sure to obtain the best of our services.
- I always ask that you carefully and thoughtfully review all communications from me. Furthermore, ask for clarification on anything that you do not understand.
- I ask that you commit to our scheduled sessions, being present and fully participating. I schedule and conduct our sessions with great intention. I ask that you call on time and be prepared for a one hour telephone session. I also ask that you minimize all external distractions so that you can be fully with me during the time we spend together.
- I ask that you demand clarification, when needed. If, at any time, you find that I am speaking in terms that you don’t understand, I ask that you make me aware of it, and request clarification.
- I ask that you be open to learning all that you need and want to learn in our relationship together.
- I ask that you uphold the utmost integrity in our relationship by being completely open and forthright with me about your financial affairs, goals, dreams, and your feelings.

