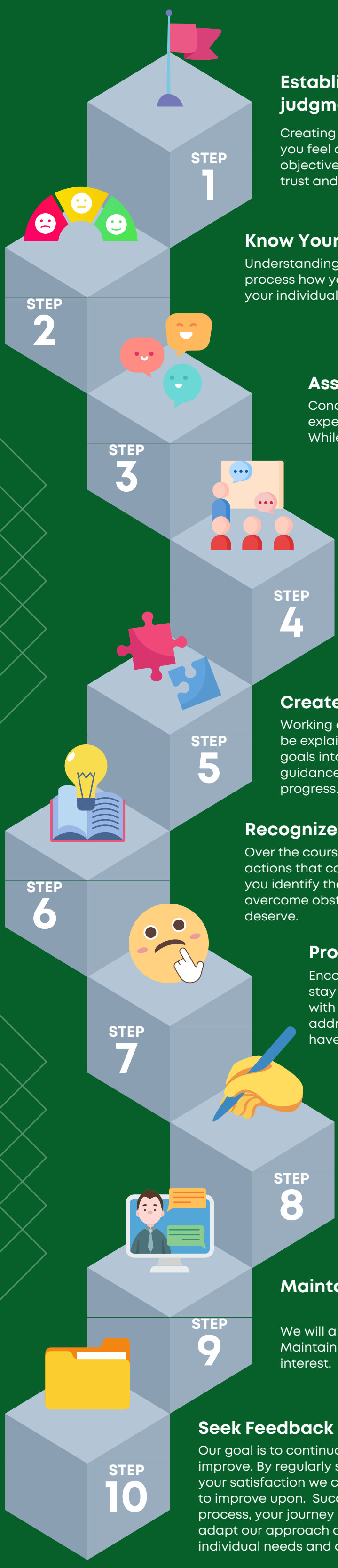
Our Coaching Process



Establish trusting and non judgmental relationships

Creating a safe and supportive environment where you feel comfortable discussing your financial objectives without fear of judgement. Maintain your trust and ensure confidentiality.

Know Your Clients

Understanding your goals and values. Taking time to process how you emotionally deal with money. Assessing your individual needs and priorities.

Asses your current situation

Conduct a thorough assessment of your cash flow, expenses, assets, liabilities and financial habits. While creating a personalized plan just for you.

Educate and Empower you

Providing knowledge and tools you need to be successful in today's world. Offering educational resources, explaining financial concepts in simple terms and encouraging the asking of questions.

Create Realistic and Actionable Plans

Working collaboratively to develop plans which can be explained in everyday language. Breaking down goals into smaller, achievable steps and providing guidance on how to implement and track your progress.

Recognize Behaviors

Over the course of the plan certain behaviors and actions that consistently occur will happen. Helping you identify them and addressing them will help you overcome obstacles in achieving the success you deserve.

Providing ongoing support

Encouragement and accountability helping you stay on track is critical. Regularly checking in with you to celebrate the successes, and address any challenges or setbacks that may have been encountered.

Write often

Staying in touch whether that be email, text or a 1to1 meeting helps keep your objectives top of mind. We respect what we inspect. Not only to just inspect but we want to document our plans, decisions and results.

Maintain Ethical standards

We will always act in the best interest of our clients. Maintain confidentiality and avoid conflicts of interest.

Seek Feedback

Our goal is to continuously learn and strive to improve. By regularly seeking feedback and gauging your satisfaction we can identify areas that we need to improve upon. Success coaching is a collaborative process, your journey will be unique. We strive to adapt our approach and techniques based on your individual needs and circumstances.