



# WHAT IS A SUCCESS COACH ?

YOUR HUMAN CONNECTION TO  
THE SUCCESS YOU DESERVE

# Our Purpose

As your success coach we provide guidance and support to individuals and families in managing their personal finances. Our primary role is to help you gain a better understanding of your current situation, set financial goals, develop strategies and find extra money you need to ensure your success. Unlike typical advisors who only focus on financial products, we focus more on emotional, behavioral and education aspects of personal finance. Some common areas we provide assistance with are budgeting, debt management, savings strategies, and improving financial literacy.

Our approach is holistic, not just considering the numbers but adding a human element to understand your beliefs, values and behaviors to money