



## **Our Process for Individuals and Families**

**Initial Consultation** – We will meet with you for a free 20 – 30 minute consultation to go over where you are and what you wish to accomplish in your time with us. At this session, we will schedule a time to begin your coaching.

**First Appointment** – We will schedule a two hour appointment with you where we will meet together in person and begin the process of providing you with information and hope to address whatever circumstance you find yourself in. Whether you are struggling and looking for steps to address the problems or are blessed to be in great shape and looking toward retirement savings, college funding or wealth building, our session will begin a process to allow you to reach your goals.

**Follow Up Appointment** – At the end of our initial appointment, we will schedule a follow-up appointment in about 30-days where we will review your progress and make adjustments as necessary to allow you to Win!

**3-Month Availability** – After the second appointment, we will be available for ongoing assistance by phone or e-mail for a period of 90 days.

**Continuing Assistance** - We are available for additional coaching and counseling after the 90-day free follow-up period if you want to continue using our services.

**Pre-Marital Counseling** - One of the most often mentioned cause of stress in a marriage is finances. Getting off to a good start can eliminate many problems in the future. Learn to communicate about money and be in agreement. A valuable time spent with your future spouse.

**Pre College Counseling** - The average young person going off to college today will be inundated with offers for credit. Learning how to manage on their finances on a budget and how to live at college without consumer debt will keep them out of trouble. Invest a little time now and win financially in the future!

Remember, most of what we do in life is done by habit. Our goal is to develop habits that will enable you to not only win financially, but in life as well.