

## Financial Coaching Program

### About the program.

The Financial Coaching Program is designed to support clients to build their financial resilience, develop more confidence in their financial lives, and improve their overall financial wellbeing.

The Financial Coaching Program provides a free and confidential service, delivered in a non-judgemental environment of mutual respect and understanding, where our Financial Coaches walk alongside their clients to improve their financial wellness.

Specifically, the program aims to support clients to:

- Explore the values, beliefs and challenges affecting their financial lives
- Identify their specific financial goals and outline practical steps toward achieving them
- Build self-awareness of their current financial habits, and support them to make effective changes to improve their overall financial wellbeing
- Better-understand their financial situation, and any financial issues they are facing
- Build their financial skills and capacity, improving their ongoing ability to resolve, or prevent, financial challenges
- Identify and access relevant resources and services available to them, enabling them to address their financial needs (this may include discussing other service options available to a client and providing them with appropriate referrals, where they have provided consent to do so).

**Please Note:** This program does not provide clients with any legal or professional advice.

Further, Uniting WA's Financial Coaches **do not** make decisions, or contact third-parties (such as creditors), on a client's behalf as part of this program.

The guidance and information provided as part of this program is intended to support clients to make informed financial decisions for themselves. Clients are solely responsible for any financial decisions, or actions, they take.

### Privacy and Confidentiality

Uniting WA is committed to keeping personal and sensitive information private. Uniting WA manages the personal and sensitive information we collect in accordance with the Australian Privacy Principles, and the Privacy Act 1988. Further information about how Uniting WA handles personal and sensitive information can be found on the Uniting WA website.

### Feedback and Complaints

Your feedback is welcome. We're interested in what matters to you. And if there's something we can do to improve the support we provide to people in the community, we want to know about it. When you give us feedback or make a suggestion about how we can do things better, we'll share this information with our team members and take action where necessary. Further information about feedback and complaints can be found on the Uniting WA website.

## Client Agreement.

This Client Agreement (Agreement) is provided to all prospective clients of the Financial Coaching Program. Should you wish to confirm your participation in the program, please complete the Client Declaration below, and return your completed Agreement to [FWS@unitingwa.org.au](mailto:FWS@unitingwa.org.au).

Client Details		Coach Details	
Name:		Name:	
Phone:		Phone:	
Email:		Email:	

### Program Structure

Session dates and times will be mutually agreed between you and your Financial Coach.

### Changes and Cancellations

If you are unable to attend a scheduled session, or if you need to change the time of a scheduled session, please contact us as soon as possible. No-shows and frequent cancellations or session changes may result in the cancellation of a client's future scheduled sessions, allowing time for other clients.

### Client Feedback Survey

As part of your participation in the program, you may be asked to provide feedback on your experience. This feedback enables us to review our performance and make improvements to our service.

### Client Responsibilities

As participants of the Financial Coaching Program, clients are responsible for:

- Treating Uniting WA staff with courtesy and respect at all times
- Willingly and actively participating in the program
- Providing their Financial Coach with accurate and truthful details of their circumstances
- Providing as much notice as possible in relation to any session changes or cancellations.

Uniting WA reserves the right to cease the provision of services under this program where a client has failed to meet the above expectations and / or in the event that Uniting WA should have inadequate resources and / or funding to continue the delivery of the service.

### Declaration

By signing this declaration, you acknowledge that you have read, understood, and agree to, the terms and information provided above.

Client Signature:		Date:	
Coach Signature:		Date:	