Financial Coaching Process

WINGS FOR WIDOWS

90 min Sessions

Engagement

2-4 Sessions

SESSION 1: GET ACQUAINTED

- Introduction
- Review Let's Get Started & Table of Contents (Guidebook)
- Topic 1: My Spouse
- Topic 2: My Spouse's Estate
- Topic 3: About Me & Our Family
- Topic 4: Financial Snapshot
- Topic 5: My Hot Topics
- Determine date for next session

SESSION 2: GET ORGANIZED

- Topic 1: Safeguarding My Credit & Protecting My Identity
- Topic 2: My Important Documents
- Determine date for next session

SESSION 3: GET PRIORITIZED

- Topic 1: Claiming My Benefits
- Topic 2: Managing Money Flow
- Topic 3: Understanding My Banking
- Topic 4: Understanding My Investments
- Determine date for next session

SESSION 4: GET STABILIZED

- Topic 1: Taking Ownership of My Assets
- Topic 2: Understanding My Taxes
- Topic 3: Understanding My Insurance Needs
- Topic 4: Protecting My Estate
- Topic 5: Managing My Household