

## Financial Coaching Client Deliverable Checklist

- Tool for tracking current spending (pen+paper/[Google Form](#), etc.)
- [Net Worth Spreadsheet](#)
- Establish credit score via Credit Karma
- Discover your WHY
  - [Time Travel Interview](#)
  - Life Questions form
- Goal Setting
- Needs/Wants/Oughts
- [Goal tracking worksheet](#)
- Uncover Obstacles Brainstorm
- Delivery of 'Plan for Awesomeness'
- Mid-Point Client Feedback Survey
- Implement ongoing budgeting system (YNAB/First Step Cash Flow)
- Open Checking & Savings accounts for Needs, Wants & Savings
- [Bank automation](#) for transferring money to and from new accounts
- Revisit credit score, discuss impact factors
- Explore ways to increase income
- [Travel Hacking Guide](#) (optional)
- Post-Program Client Feedback Survey