Financial Coaching Resources

Below you will find a variety of helpful coaching resources.

Streamlined Registration Form for participants (launched fall 2019):

- We noticed that participants often arrived with incomplete (at best) or blank (at worst) financial information for us to review.
- In order to help with this issue, the registration form has been streamlined to capture some important elements up front, without the need for the three additional forms we have required in the past (List of Debts, Monthly Budget Worksheet, Personal Balance Sheet).

You can also access a copy of the STEWARD document to walk through with your coaching participant.

Upon completing your coaching meeting, please be sure to complete the Financial Coaching Follow-up Form.

Below are additional links to Summit resources that may be helpful as you coach:

- Stewardship Resources
- Stewardship Trainings
- The Stewardship Digest
- How to Join a Small Group
- Counseling Ministry
- Preparing for Marriage Ministry
- G4 Recovery/Support groups
- Benevolence Needs

If you need help getting your coaching participant connected to anything further please contact Blair Graham, Pastor of Stewardship and Generosity at bgraham@summitrdu.com or (919) 354-5952.