

WA Financial Coaching Network

April 24, 2024

2:00 - Welcome & Introductions

Thushari Gooneratne

- Icebreaker: If you could give any part of your job to AI, what would it be?

2:10 - Partner Spotlight

- Take Charge Consulting – Teirra Bonds

2:25 - Partner Announcements

Thushari Gooneratne, Ryan Davis, Members

- Linking Communities to Safe, Affordable Financial Services: What is Bank On? Tuesday May 7th 10-11 am - <https://bit.ly/What-is-Bank-On>
- Credit Building Resources, Wednesday, June 26th 2-3:30p
<https://bit.ly/Credit-Building-Resources>
- Do you want to be a future Partner Spotlight?
<https://bit.ly/FCN-Partner-Spotlight>
- Member announcements -

2:40 - Coaching Session: Making a Money Plan

Thushari Gooneratne

- 5 min - Introduction to the topic: the power of a money plan and the challenges of making that conversation worthwhile.
- 20 min - Breakout rooms
 - Test out a money plan activity (CFPB or otherwise)
 - OR discuss how you use tools to make budget conversations easier
- 25 min - Report out takeaways

- What works in your coaching practice?
- How do you make money planning feel comfortable?