

# 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 & Black Owned Business Excellence  
– 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?