

Who We Are

Tribe is a consulting and coaching firm providing experiential training, high impact organizational development, and workplace performance coaching. Tribe has a professional team of trainers and facilitators who align with each corporate client and their specific needs. We are aligned with a coaching system that comprises 250 coaches throughout North America. Tribe is committed to creating high performance organizations through the development of high performance individuals and teams.

What previous are saying about the Introduction to Financial Coaching Program:

- “These skills have become so very important in my work and in my life.”
- “Coaching is a comprehensive frame and structure that can move people towards their goals in an efficient, client driven process. There were lots of great skills and structure, putting them all together for a client was definitely the most powerful.”
- “Clients are showing up differently. They are definitely more engaged and alive. “
- “It’s going to help make my appointments shorter and make them more responsible for what they are able to do.”
- “We have tightened/strengthened our program so that we have program agreements and we have raised our expectation level of our clients. “
- Outstanding, my life has changed because of it (this program).”
- “This program was creative, powerful, efficient and seamless. It moved along well and never felt forced or out of order. The materials were very thorough and user-friendly. It is challenging to provide a new paradigm to a very diverse set of individuals and it always felt personal and relevant. Both of the trainers were informed, open, flexible, and dedicated to our learning.”
- “Veronica and Paige: I just want to thank you for all the insights you shared with us. Your professionalism stands out and speaks for itself. You did a great job by bringing the best in each participant in each meeting. “
- “Thank you for a great training!”



tribe coaching inc.
160 c donahue st. #151
sausalito, ca 94965
415.331.6070 voice
415.331.3615 fax

www.tribecoaching.com

Introduction to Financial Coaching

The Introduction to Financial Coaching Program gives participants an overview of the Financial Coaching process. This three part workshop series includes:

Day One and Two: Overview of Coaching:

This 2 day session gives an overview of the coaching skill set, and provides experiential, high-impact practice sessions that give you skills you can apply immediately. Theme for this session: Empowering vs. Enabling the Relationship.

Day Three and Four: Resistance Into Power

This 2 ½ day session explores the reason clients resist and avoid taking action regarding the circumstances in their lives. We will explore topics such as limiting beliefs, facts vs. feelings and Victim Talk. We will also play the Cashflow 101® game after a dinner break. Cashflow 101® is a cutting edge board game that teaches the principles of financial literacy in a fun, easy to understand way.

Day 5: I³, Integration/Implementation/Impact

This one day session integrates the previous sessions and includes goal setting, game planning and concrete and creative tools for facilitating and sustaining action and momentum with clients.

Integration Coaching

Group Coaching

The Introduction to Financial Coaching Program not only gives participants an overview of the Financial Coaching process, it also gives participants an opportunity to test coaching skills in a supportive environment. Group coaching occurs via tele-conference call. Group Coaching occurs in between trainings and includes networked learning, action and accountability. Participants will leave each call with homework from their action plan.

Group coaching invokes two of the most powerful levels of individual change: accountability and networked learning. People are accountable for applying the skills and behaviors because they're going to have to talk about them, and commit to them, on a regular basis. This leads to new habits and new financial results.

Networked learners can give each other support, help, and advice, so that anyone's experience can become everyone's learning. Behavioral change become less about doing what they learned in training, and more about supporting their own, and each other's work in an ongoing and powerful way.

Cashflow® 101 teaches the principles of financial literacy. It compels the participants to use budgets, income statements, balance sheets and investment strategies in a highly charged, competitive atmosphere. While Cashflow® 101 is safe and fun, it provides a highly accurate picture of individual money behaviors. Cashflow® 101 clearly demonstrates individual strengths and weaknesses, as they relate to money.

Before we play Cashflow® 101 we play the **Money Mixer**-this is a hard-nosed money negotiation with winners and losers. It creates an urgent sense of victory or defeat in an intense three- minute exercise. This exercise gives participants a snapshot of how they treat money in their lives.

The Cashflow® 101 course also includes:

Tools of Wealth Building

- ★ Income Statements and Balance Sheets
- ★ Assets vs. Liabilities
- ★ Spending Plans

CASHFLOW-The Game

- ★ 2 hours

Cashflow® 101