

(15B) FINANCIAL MENTORING AGREEMENT

This Agreement is made on _____ (date) _____, between _____ (client name) _____ ("you" or "your") and _____ (mentor name) _____ ("Financial Mentor"). As a participant in the Financial Mentoring Program, you understand and agree to the following:

1. **Financial mentoring services.** The Financial Mentor will assist you in developing an action plan to help meet your personal and financial goals. The Financial Mentor will also be available for a limited amount of follow-up assistance, as determined by you and the Financial Mentor. All meetings will take place by phone or in person.

2. **Cost of services.** Participation in the Financial Mentoring Program is free. The Financial Mentor provides services at no charge. However, any other costs associated with completing your action plan are your responsibility (For example, if the Financial Mentor suggests that you pay a late bill, the actual payment will be your responsibility).

3. **Participation.** Participation in the Financial Mentoring Program is voluntary. You may end your participation at any time.

4. **Review of financial materials.** The Financial Mentor may ask you to share financial information in order to provide services. This may include credit card statements, loan statements or other relevant items. All financial materials will be held in confidence and used exclusively for the purpose of providing services to you under the Financial Mentoring Program.

5. **Scope of services.**

- (a) The services provided by the Financial Mentor are offered only as guidance to help you meet your financial goals.
- (b) You are free at all times to accept or reject any recommendations from the Financial Mentor.
- (c) You have the sole responsibility for completing the activities in your action plan.
- (d) The Financial Mentor cannot guarantee the results of any recommendations or activities you undertake because of participating in the program.

6. Incentive. If you are one of the first 30 people to complete the intake process and your in-person action plan meeting, you will be eligible to receive your choice of either: one (1) free car payment; or a 1-year basic membership to the American Automobile Association (AAA).

7. Authorization for Exchange of Information: To better serve you, it may be helpful for the Financial Mentor to talk to others who are providing other services or support to you, such as a case manager or training provider. The Financial Mentor will ask your permission before contacting any other service provider.

8. Release of Information. (Organization) may publicize the Financial Mentoring Program to educate others about its services or to seek additional funding. (Organization) will NOT use your name or share personal or financial information in these materials.

9. Release of Liability. As a condition of participating in this free Financial Mentoring Program, you will not make claims of any kind against the Financial Mentor that in any way arise from or are related to the services you received.

This Agreement is effective as of the date above.

Financial Mentor

Signature

Participant 1

Signature

Address

City, State and Zip code

Date