

CNM Coach Toolkit

Supplemental Materials | Appendix D: Coach Toolkit

The following pages are blank workbook pages that make up the Coach Tool Kit. This tool kit may be used by individuals who have completed the 40-hour Financial Coaching Training offered by CNM Ingenuity, Inc. The documents found in this toolkit are taken directly from the Financial Coach Training Manual.

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Priorities Checklist

Beliefs and Emotions

Emotional States Around...

Beliefs Turnaround

Values Checklist

Top 5 Values

Wheel of Life

Coaching through Change

Mind Mapping through Crisis

Urgency Quadrant

CNM Coach Toolkit | Priorities Checklist

Importance to You					Priority Area	How Well You're Doing				
5	4	3	2	1	Managing daily expenses and staying out of debt	5	4	3	2	1
5	4	3	2	1	Maintaining sufficient income to meet your needs	5	4	3	2	1
5	4	3	2	1	Maintaining safe, stable housing that meets your needs	5	4	3	2	1
5	4	3	2	1	Pursuing education and professional development	5	4	3	2	1
5	4	3	2	1	Supporting friends and family members when needed	5	4	3	2	1
5	4	3	2	1	Building a fulfilling career or meaningful employment	5	4	3	2	1
5	4	3	2	1	Maintaining health insurance coverage	5	4	3	2	1
5	4	3	2	1	Managing your time in a way that serves you	5	4	3	2	1
5	4	3	2	1	Managing time in ways that support your priorities	5	4	3	2	1
5	4	3	2	1	Maintaining reliable transportation	5	4	3	2	1
5	4	3	2	1	Maintaining physical, mental, and dental health	5	4	3	2	1
5	4	3	2	1	Engaging in community involvement and civic participation	5	4	3	2	1
5	4	3	2	1	Spending quality time with family and loved ones	5	4	3	2	1
5	4	3	2	1	Maintaining supportive friendships and healthy relationships	5	4	3	2	1
5	4	3	2	1	Establishing and maintaining will and estate planning documents	5	4	3	2	1
5	4	3	2	1	Pursuing personal spiritual goals or practices	5	4	3	2	1
5	4	3	2	1	Making time for recreation, rest, and downtime	5	4	3	2	1
5	4	3	2	1	Staying relevant and keeping up with technology	5	4	3	2	1
5	4	3	2	1	Maintaining a sense of personal freedom and independence	5	4	3	2	1
5	4	3	2	1		5	4	3	2	1
5	4	3	2	1		5	4	3	2	1
5	4	3	2	1		5	4	3	2	1

CNM Coach Toolkit | Beliefs and Emotions

Put a check mark next to the statements you agree with, then fill in the blank spaces with your own ideas

<input type="checkbox"/>	I am trapped in debt, and people like my family and me will never get out
<input type="checkbox"/>	
<input type="checkbox"/>	I am not smart enough to manage my finances or invest
<input type="checkbox"/>	
<input type="checkbox"/>	I cannot get my partner to quit spending money
<input type="checkbox"/>	
<input type="checkbox"/>	I cannot save enough money for a meaningful retirement
<input type="checkbox"/>	
<input type="checkbox"/>	I feel my credit is so bad, it doesnt matter what I do
<input type="checkbox"/>	
<input type="checkbox"/>	I am expected to support my family, so whenever I have money, it does to them
<input type="checkbox"/>	
<input type="checkbox"/>	I feel you have to have money to make money. Investing is for the rich
<input type="checkbox"/>	
<input type="checkbox"/>	I believe investing is not for me. Investing and the stock market is too confusing.
<input type="checkbox"/>	
<input type="checkbox"/>	I am too old. It's too late for me.

CNM Coach Toolkit | Beliefs Turnarounds

Limiting Belief

Dig as deep as you can to find what you hold as true



Behaviors

What do you say to yourself that aligns with the limiting belief? What do you do? What do you avoid doing?



Outcome

The natural impact of holding the limiting belief. The natural outcome is the result of the behavior, not the belief



Desired Outcome

What is it that you really want?



Behaviors

How would you act differently if the outcome was guaranteed? What would you see? What would you hear yourself or others saying?



New Belief

What would you now believe that will attract the desired outcome



CNM Coach Toolkit | Values Checklist

Write out one of your limiting beliefs, either from the options below or create your own

What do you have to have in order to be you?

What traits in others annoy you? (Turn this around, and there is often a value underneath it)

Values are who you are at your core. How you define a value and the order in which you rank them is unique to each human. Values dictate the choices we make, whether we are aware of them or not.

CNM Coach Toolkit | Values Checklist

Select which of these values are most important to you. 3 is most important, 2 is very important. 1 is important.

Acceptance	3	2	1	Health	3	2	1	Preparedness	3	2	1
Adventure	3	2	1	Honesty	3	2	1	Recognition	3	2	1
Authenticity	3	2	1	Hope	3	2	1	Relationships	3	2	1
Balance	3	2	1	Humility	3	2	1	Reliability	3	2	1
Beauty	3	2	1	Honor	3	2	1	Resilience	3	2	1
Commitment	3	2	1	Inclusiveness	3	2	1	Respect	3	2	1
Communication	3	2	1	Individuality	3	2	1	Security	3	2	1
Community	3	2	1	Innovation	3	2	1	Selflessness	3	2	1
Compassion	3	2	1	Integrity	3	2	1	Self Reliance	3	2	1
Courage	3	2	1	Joy	3	2	1	Simplicity	3	2	1
Creativity	3	2	1	Justice	3	2	1	Spirituality	3	2	1
Discipline	3	2	1	Kindness	3	2	1	Stewardship	3	2	1
Excellence	3	2	1	Leadership	3	2	1	Strength	3	2	1
Fairness	3	2	1	Learning	3	2	1	Structure	3	2	1
Fame	3	2	1	Loyalty	3	2	1	Success	3	2	1
Freedom	3	2	1	Passion	3	2	1	Teamwork	3	2	1
Fun	3	2	1	Patience	3	2	1	Understanding	3	2	1
Grace	3	2	1	Peace	3	2	1	Uniqueness	3	2	1
Gratitude	3	2	1	Pers. Development	3	2	1	Wealth	3	2	1
Hard Work	3	2	1	Power	3	2	1	Wisdom	3	2	1

CNM Coach Toolkit | Values

Your life purpose or impact is all about how you make a difference and this is ALL about your values.
“Values – those wonderful, intangible things that attract you; the forces that can make pep talks and motivational speeches totally unnecessary in your life. Your values are you.” – Thomas J. Leonard, The Portable Coach

List five values that are important to you and write your definition of those values.

1 Value 1:

Value 1 Defined:

2 Value 2:

Value 2 Defined:

3 Value 3:

Value 3 Defined:

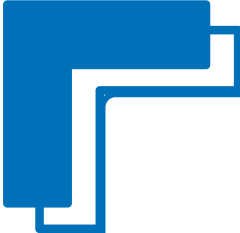
4 Value 4:

Value 4 Defined:


5 Value 5:

Value 5 Defined:


CNM Coach Toolkit | Coaching Through Change



Advantages of making this change



Disadvantages of making this change

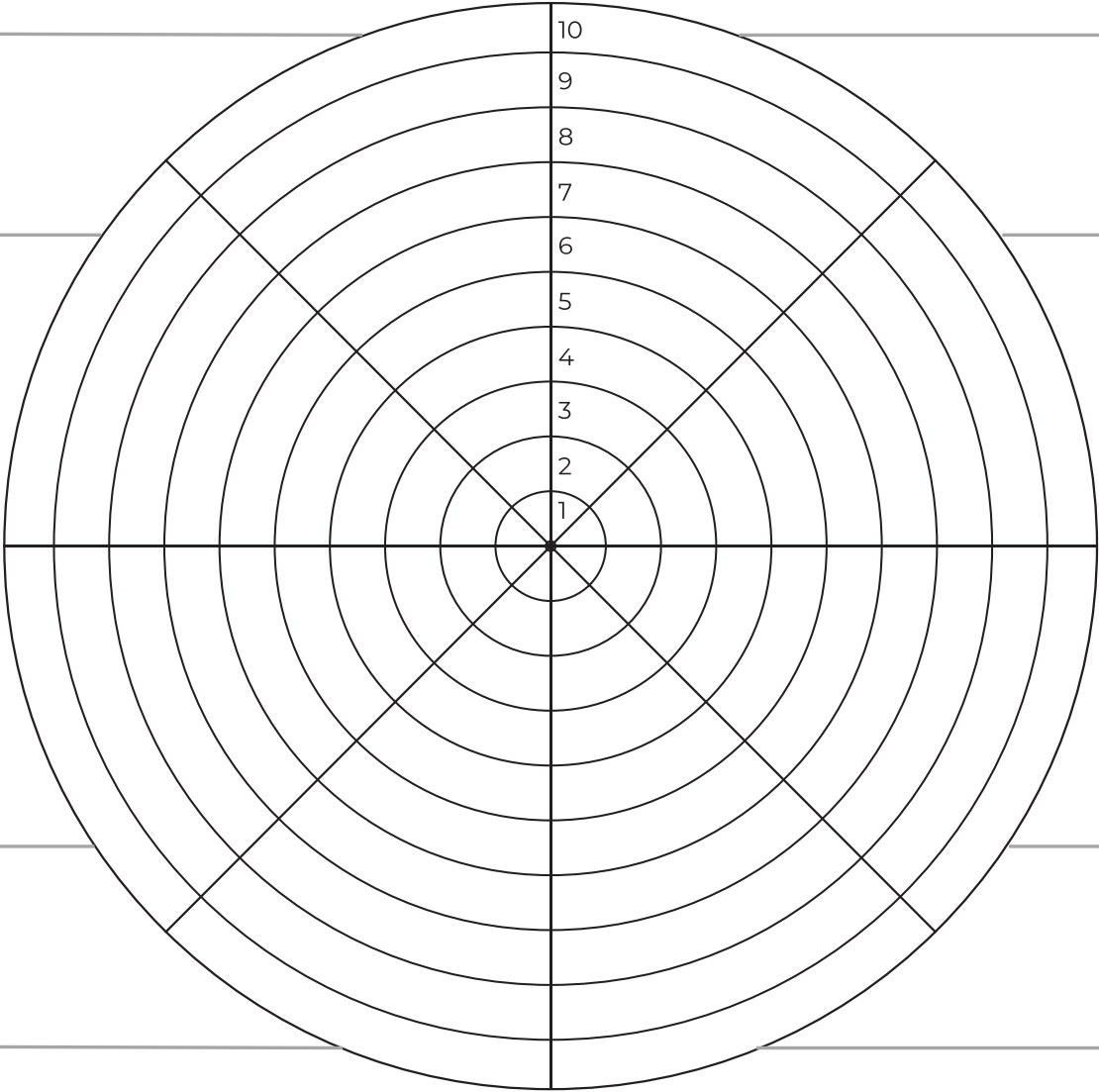


Advantages of NOT making this change

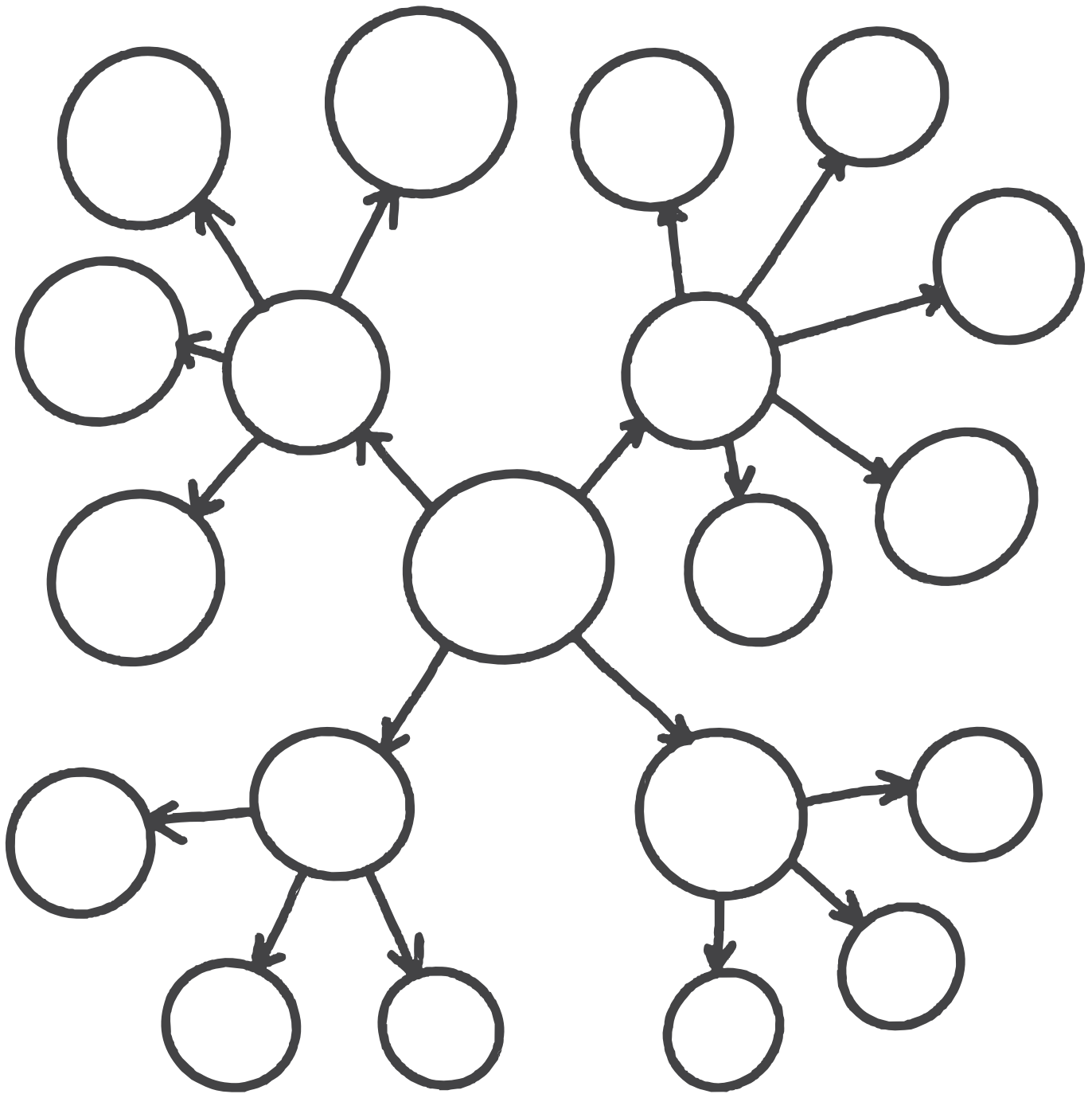


Disadvantages of NOT making this change

CNM Coach Toolkit | Wheel of Life



CNM Coach Toolkit | Mind Mapping



CNM Coach Toolkit | Urgent vs Important Eisenhower Matrix

