

# Financial Mentoring Agreement

This page sets out the responsibilities of the client, financial mentor and service.

## Client agreement (for client to complete)

- ① I agree to accept financial mentoring and will be respectful with my financial mentor.
- ② I will keep my financial mentor up to date with my contact details and tell them everything about my financial situation as part of our honest and open relationship.
- ③ If I cannot attend an appointment I will let the service know.
- ④ Either the service or I can withdraw from this agreement at any time.
- ⑤ I will do my best to keep to the agreed budget, keep to agreed arrangements, and will not obtain further credit without first discussing it with my financial mentor.
- ⑥ I understand that the service and/or the financial mentor is not liable to me under any circumstances for their actions or any advice they give, however that liability arises (including through negligence).
- ⑦ I understand that my file may be confidentially inspected by a representative of the financial capability or budgeting service's funder(s) or for the purpose of a quality review of this service.
- ⑧ I have discussed this document with my financial mentor, and I understand it.

Name of client

Client's signature

Date

Day

Month

Year

This agreement expires on:

Or: ☐ Open-ended agreement

## Service agreement (for financial mentor to complete)

- ① We will keep all client details confidential, except as authorised by this Budgeting Agreement.
- ② We will keep the client informed of matters relating to the client's finances.
- ③ When we or the client withdraw from this Agreement, we will immediately inform creditors and any other person dealt with in accordance with this Budgeting Agreement.

Name of financial mentor

On behalf of the service below

Financial mentor's signature

Date

Day

Month

Year

Financial mentoring service

Phone

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