# Welcome to the Viva Toolkit!

Our custom toolkit was designed to help you navigate your developing role as a financial coach, provide you with information to answer common questions that you might receive; and prepare you to introduce this comprehensive approach to money management to new and existing clients.

### AN INTRODUCTORY ORIENTATION

Introduce your clients to the world of Financial Capability. Ideal for a group setting.

### FINANCIAL ASSESSMENT

Let clients level-set with this general evaluation.

### "START YOUR JOURNEY" HANDOUT

Give clients the space to reflect on what they want to achieve and what they're ready to tackle.

### ASPIRATION CARDS + SPINNER

Story cards outline how real-life dreams connect to each element of DISC. Use the spinner as a means to direct the conversation.

### DISC CHECKLIST

This checklist provides you and your client actionable steps towards improving the client's financial health.

### ACTION PLAN

Help clients articulate tangible next steps to help them achieve their financial and life goals.

## Get Started!

Everything you need to begin is available on our Dropbox (link below):

- Viva Toolkit User Guide
- Financial Coaching Training PowerPoint
- Introductory Orientation PowerPoint
- Digital copies of all the tools

**bit.ly/vivatoolkit**