

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.



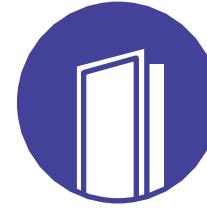
AN INTRODUCTORY ORIENTATION

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