

FINANCIAL MENTORING AGREEMENT



Participation in the mentoring program is voluntary. The mentoring program provides one-on-one communication between a mentor and mentee for purposes of developing and reaching financial goals. Mentoring relationships will focus on activities revolving around the mentee's goals outlined in the attached Financial Mentoring Plan. The following are expressed features of the mentoring relationship:

Mentor name: _____
Mentor phone: _____
Mentor email: _____
Best method of contact: _____
Best time to contact: _____

Mentee name: _____
Mentee phone: _____
Mentee email: _____
Best method of contact: _____
Best time to contact: _____

How many times will we meet?	Three	Four	Five	Six	Other		
How often will we meet?	Once a week		Twice a week		Every other week	Other	
How long will our meetings last?	15 min	30 min	45 min	1 hr	1.5 hrs	2 hrs	Other
What day(s) of the week will we meet?	Mon	Tues	Wed	Thurs	Fri	Sat	Sun

Where will we meet? _____

Role of the mentor: As a financial mentor, I will assist my mentee in developing short-term and long-term financial goals and be a source of information and encouragement as she works towards her goals. I will contact my mentee within two days of her contacting me. If I have an emergency and am unable to keep our meeting, I will contact my mentee in advance to reschedule. I will *[example: listen, suggest resources, provide feedback, not pass judgment on my mentees past or present situation, etc.]*

Role of the mentee: As a participant in the mentoring program, I will communicate regularly with my mentor and attend all scheduled meetings. I will contact my mentor within two days of her contacting me. If I have an emergency and am unable to keep our meeting, I will contact my mentor in advance to reschedule. I will develop short-term and long-term financial goals and work with my mentor towards reaching my goals.

Financial mentors sign a confidentiality agreement upon entering the program. Financial mentors will not share details about the relationship with anyone except the Women United Coordinator.