



FINANCIAL MENTORING AGREEMENT

Participation in the mentoring program is **voluntary**. The mentoring program provides one-on-one communication between a mentor and mentee for the purpose of developing and reaching financial goals.

What day(s) of the week will we meet? Mon Tues Wed Thurs Fri Sat Sun

How long will our meetings last? 1 hr 1.5 hrs 2 hrs Other _____

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 he/she works towards his/her goals. I will listen, suggest resources, provide feedback, not pass judgment on my mentee for past or present situations. I will contact my mentee within two days of being contacted. If I have an emergency and am unable to keep our meeting, I will contact my mentee in advance to reschedule. I will not share details about the relationships and finances with anyone except for the referring person and the staff of Volunteers In Service, unless permission is given by the mentee.

Mentor

Date

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 being contacted. 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.

Mentee

Date

Mentee

Date