

ON-GOING COACHING

How often should I meet with my financial coaches?

CONTENT EXPERT coaches:

- Insurance (at least annually)
- Investing (at least annually)
- Budgeting (constant in the beginning - then occasionally as you become great at this)
- Saving (Occasionally)
- Tax (annually)

BIG PICTURE coaches:

- Retirement Planning (once a decade until a decade away, then every couple of years)
- College Planning (once a child is born and then every couple of years)
- Lifestyle Planning (planning then every five years or so)



ABOUT MONDAY MONEY TIP PODCAST

The Monday Money Tip Podcast is a weekly podcast from I Was Broke. Now I'm Not. designed to help you take your personal finances to the next level. Learn more about this podcast by visiting www.iwbnin.com/podcast