

FINANCIAL COACHING SESSION VERIFICATION FORM

Participant First & Last Name:

Participant EIN:

Date of completed session:

MM/DD/YYYY

What entity coached you?

MACU URS

OTHER

Financial Coach's First & Last Name:

Financial Coach Signature:

To receive 20 points please complete the form & have your financial coach sign it (electronically or physically). Upon completion - upload it to the WellSteps Rewards under 'Financial Wellness'. *Please note: you can use any financial institution of your choosing to earn wellness points for this activity.

Mountain America Credit Union offers a wide variety of Financial Wellness Coaching (you do not need to be a member to utilize this service).

MACU: Free Financial Wellness Coaching.

URS is the county's retirement benefit. Schedule a coaching session with them to get personalized retirement advice.

URS: Free Retirement Coaching.