

# FINANCIAL COACHING SESSION VERIFICATION FORM

**Participant First & Last Name:**

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**Participant EIN:**

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**Date of completed session:**

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MM/DD/YYYY

**What entity coached you?**

MACU

URS

**Financial Coach's First & Last Name:**

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**Financial Coach Signature:**

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In order to receive 15 points please complete the form & have your financial coach sign it (electronically or physically). Upon completion - upload it to Wellsteps under 'Bonus Activities'.

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.](#)