

Financial Coaching

Frequently Asked Questions

We consider it an honor to walk with clients at every stage of their financial journey. The common cause around which we rally is freedom.

Benchmark links arms with clients as they experience freedom from debt and in turn, find true financial freedom.



When do I need a financial coach?

Financial coaches work specifically with people who want to pay off debt, increase savings, improve their budgeting, and/or make changes to their financial behavior.

How many times should I expect to meet with a coach?

While some clients prefer to meet with a coach a few times to build a plan, others prefer monthly accountability meetings. The financial coach will do what best suits your needs.

I'm not sure I'm ready to meet with a financial coach yet. Do you have any tools that would help me get started on my own?

We like to keep things simple. These tools will give you a solid foundation before meeting with a financial coach:

- Dave Ramsey's Baby Steps**
- A budget (Excel, Every Dollar, and old-fashioned legal pad, or Benchmark's Budget. *See our Cash Flow Resource page to download a copy.*)
- Debt Snowball
- Follow Benchmark's *Financial Foundations* videos on YouTube or Facebook.

What books do coaching clients find useful?

- *Total Money Makeover* by Dave Ramsey**
- *Profit First* by Mike Michalowicz**

***Dave Ramsey and Mike Michalowicz are not affiliated with Benchmark Wealth Management or LPL Financial.*

What can I expect to pay for financial coaching?

Coaches set their own rates. There is some variance among those rates so we will always give you a few names. We encourage you to get in contact with each coach to choose the best fit for you.

Do you provide in-house coaching?

Contact Sarah Beach, Branch Manager, at (901) 682-7449 or sarah.beach@benchmarkwealth.com for details.

You are under no obligation to use the services of any third party Financial Coach provided, and you may choose any qualified professional to provide services.

LPL Financial is not affiliated with nor endorses any third party financial coaches or entities.

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