

UMT COACHING



# SMART MONEY MANAGEMENT

## 2025

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# Your money is too important to leave on autopilot!

We are delighted that you've chosen to embark on a transformative journey with **UMT Coaching**. Here, we empower individuals like you to recalibrate your life's trajectory and take charge of your financial future with confidence and clarity.

At **UMT Coaching**, we are deeply committed to guiding you toward your true purpose and equipping you with the tools to manifest the life you envision. Our mission is to inspire, uplift, and drive meaningful change in every aspect of your life.

Through our **UMT Coaching Smart Money Management Program**, we deliver premier coaching designed to provide you with the essential skills and insights needed to master your finances. Our program offers invaluable guidance on understanding your spending habits, eliminating debt, and reshaping your relationship with money, ensuring lasting financial wellness.

During our sessions, we focus on fostering profound self-awareness, identifying recurring patterns, clarifying values and objectives, and crafting actionable steps toward realizing your authentic purpose and blueprint for success.

Welcome to **UMT Coaching**, where your transformation begins. Prepare to embark on a journey toward **financial freedom and personal fulfillment**, your future starts now!

WELCOME

# MEET OUR COACH



*Founder & Strategic Coach*  
JB@umtcoaching.com

**Helping purpose-driven individuals build wealth across every dimension of life: spiritually, mentally, socially, physically, and financially.**

With more than 15 years of experience guiding clients toward clarity, confidence, and impact, JB specializes in coaching individuals and organizations to build lives and legacies that reflect intentional purpose, not default circumstance.

Armed with a Master's in Organizational Leadership & Innovation with a Financial Management focus, and certified through the Fierce Coaching Program, JB brings a rare blend of strategic insight and emotional intelligence. Her coaching centers around five powerful pillars: connection, resilience, delegation, feedback, and accountability.

JB works with clients to identify the life patterns they've aligned with, often unconsciously, and recalibrate those frameworks to better reflect their vision and values. Whether addressing smart money management, estate planning, life transitions, leadership development, or brand clarity, her forward-thinking, results-driven approach helps clients move from uncertainty to intentional action.

Through customized coaching, workshops, and digital solutions, she empowers clients to create an authentic blueprint for success. Together, you'll establish clarity around whether you're living a **called life** or one you've simply drifted into.

Every interaction is guided by the principle that **"iron sharpens iron"**, because surrounding yourself with growth-minded people is the bedrock of transformation.

**JB's Goal:** help clients unlock the fullest version of themselves and build wealth—beyond finances—in every corner of their life.

# Four Ways To Participate With Confidence

If managing your money ever felt overwhelming, you're not alone. That's why we created the **UMT Coaching Smart Money Management Program**. A simple, powerful solution built to give you clarity and confidence with your finances.

We offer **four levels of service** to meet you where you are, whether you prefer to work independently or would benefit from full, personalized support. Each option is designed to match your comfort level with navigating Microsoft Excel. From a self-paced, do-it-yourself experience to our hands-on, white-glove service, you can choose the level of guidance that's right for you.

Participation in all service levels of **UMT Coaching Smart Money Management** requires use of a personal laptop and access to Microsoft Excel. These tools are necessary to complete, store, and manage your personalized planning documents.

No matter which option you select, our goal remains the same: to help you prepare today and protect tomorrow with clarity and confidence.



Service

Support

Accountability

# WHAT'S INCLUDED



- **Welcome Video** to guide your journey
- **1 Virtual Coaching Session**
- **UMT Coaching Reference Guidebook**
- **UMT Coaching Digital Workbook**
- **Email Support for 30 Days**  
(within 30 days of purchase)

# SESSION ASSIGNMENTS

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## FOR VIP CLIENTS

If you decide to select our **VIP Package**, this entails our comprehensive, white-glove service, you will receive step-by-step support within the **three personalized sessions**.

This service is designed with care and detail to ensure you feel supported and guided through building a solid foundation for managing your money.

### SESSION 1

- What's Your Money Color?
- Establishing Your Goals
- Reviewing Non-Monthly Expenses

### SESSION 2

- Reviewing Gifts
- Determining How You Capture Your Income & Expenses (Monthly or Biweekly)
- Review Debt Snowball

### SESSION 3

- Review Savings Goals
- Review Net Worth Goals
- Tools on Refining Your Financial "Blueprint"

# ACCOUNTABILITY

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## PARTNER

### ACCOUNTABILITY COMMUNITY

After successfully completing our **UMT Coaching Smart Money Management Program**, past clients are invited to join our exclusive 'Accountability Community'. Reach out for a check-in to discuss life changing events that can affect your financial landscape.

Allow for the opportunity to **“Dig Deeper”** - you will receive monthly or quarterly coaching sessions to track financial and life progress, addressing any arising issues. For this level of service, clients will also receive monthly text message check-ins.

Please note, this **“Dig Deeper”** service incurs an additional fee.

# SCHEDULING

## ELEVATE YOUR FINANCIAL PLANNING WITH SMART MONEY MANAGEMENT

Streamline, simplify, and safeguard your legacy with the **UMT Coaching Smart Money Management Program**, a seamless digital solution designed to enhance financial planning efficiency while providing peace of mind.

Ready to seamlessly transition into a digital format? Let's connect today to explore how **UMT Coaching Smart Money Management** can complement your financial planning.

**Book A Package Today  
On Our Website!**

Get Started on building a solid  
"Blueprint" for your financial future!