

Crown Budget
Coaches Quarterly
Meeting
September 9, 2021

Presented by: Crown Ministries Budget Coach
Trainers and Coaches

Steve Brooks, Marilyn Butler, Sue Derr, Harry
Dodd, Priscilla Douglas, Randy Rowekamp, and
Alet Strydom



CROWNTM

Advancing God's Principles of Stewardship and Life

Agenda

Welcome & Open in Prayer

Coaching Update

Timely Topics

Chat Responses

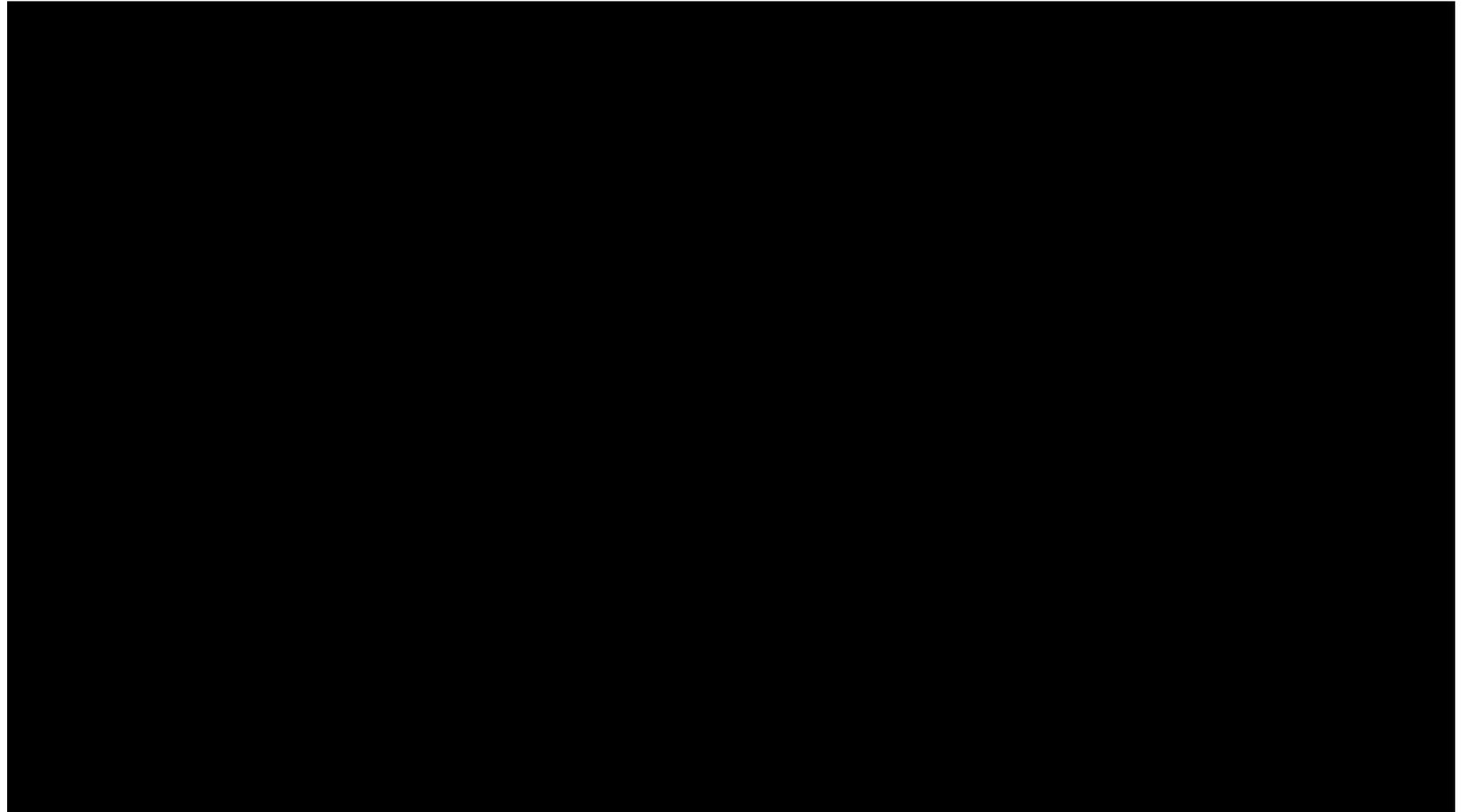
Close in Prayer

Budget Coaching

Luke 15: 4&5

4 What man of you, having an hundred sheep, if he lose one of them, doth not leave the ninety and nine in the wilderness, and go after that which is lost, until he find it? 5 And when he hath found it, he layeth it on his shoulders, rejoicing.

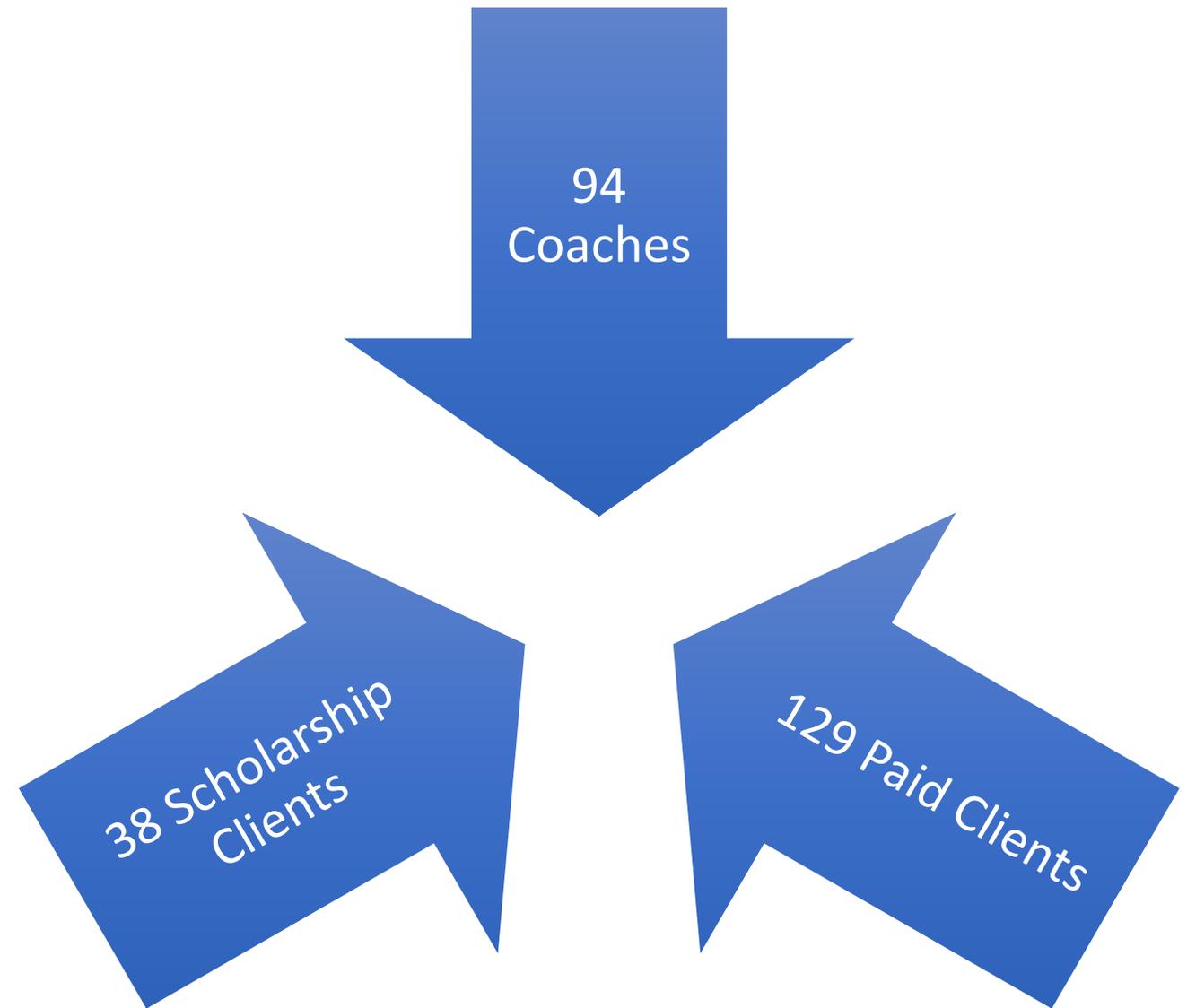
Presented by: Alet Strydom
Director Assessments & Coaching



Budget Coaching Statistics

Presented by: Alet
Strydom

(Since the switch to
Edvance360 in Feb
2021)



Budget Coaching Updates

Updates Completed since June '21

1. PID PDF Report Fixed
2. Updated all Budget Forms in Lesson 1
3. Added My Story in Session 5
4. Added Celebration in Session 6
5. Completed Syllabus and uploaded in course
6. Updated Budget Coach Manual
7. Resource Repository Course added

Projects in Progress

1. MLI – New update site (Feb'22)
2. Budget Coach site with profiles (June'22)

Timely Topics

Money Map

- Get Well – Destinations 1-3
- Do Well – Destinations 4-6
- Finish Well – Destination 7

Telling My Story



GET WELL

HOW CAN THE COACH HELP CLIENTS GET WELL?

PRESENTED BY: RANDY ROWEKAMP

MY JOURNEY TO FINANCIAL FREEDOM

GET WELL

1

- ### BUILD EMERGENCY SAVINGS
- Track spending and create your spending plan that leads to "buy you all Christmas"
 - Save \$1000 for emergencies
 - Start giving regularly to the Lord

"The more you give for the Lord, the more the Lord will reward you with His grace." Proverbs 21:26

2

- ### PAY OFF CREDIT CARD DEBT
- Pay off credit cards (use the Debt Snowball Calculator at [crown.org](#))
 - Increase savings to cover health's rising expenses
 - Increase giving to the Lord through your time, talents, and money
 - Look for creative ways to increase your income

"The borrower is servant to the lender." Proverbs 22:7

3

- ### PAY OFF ANY OTHER CONSUMER DEBT
- Pay off all consumer debt (cars, furniture, medical bills, etc.)
 - Increase savings to cover rising expenses
 - Increase giving to the Lord's work

"Keep out of debt and you will not weary." Proverbs 22:7

4

- ### ADJUST YOUR PLAN
- Adjust your spending plan accordingly
 - Start saving for major purchases
 - Start saving for retirement (401k/IRA or 529 plan)
 - Increase savings to 6 months' living expenses
 - Revisit your life assessment and adjust your goals

"Remember the plans 'God has for you.' declares the Lord. 'None will prosper who do not plan. None plans for you who 'have not a future.'" Jeremiah 29:11

5

- ### SAVE FOR THE FUTURE
- Continue saving for major purchases and retirement
 - Continue saving up to 12 months of living expenses
 - Create education college funds for each child
 - Increase giving to the Lord's work

"Never put off doing a good deed until you die." Proverbs 13:24

DO WELL

6

- ### INVEST WISELY
- Buy affordable home
 - Begin growing/term life insurance
 - Invest in real estate
 - Increase giving to the Lord's work

"Invest in wisdom, and you will prosper. You will profit and your hope will not fail." Proverbs 24:7

7

- ### LEAVE A LEGACY
- Pay off home mortgage
 - Revisit children's education fund
 - Confirm estate plan is in order
 - Be charitable intentionally
 - Maximize generosity

"You will leave the mark, and the mark will make you free." John 8:31-32

FINISH WELL

TRUE FINANCIAL FREEDOM

Experience true financial freedom as the majority of your time, talent, and money is given to the Lord's work!

"No matter how much you give, and how big your heart is, the more you give, the more you will receive." Proverbs 11:24

PREPARE FOR THE JOURNEY

START HERE

- Review "Here's How the Crown Money Map Works" on the back of the map.
- Read the primer on the back or say your own and prepare your heart.
- Complete the "My Life Purpose" and "My Goals" sections on the back.
- Take the MoneyLife® Indicator assessment at [mll.crown.org](#) to understand how your beliefs and behaviors relate to money.
- Make a plan for how you will celebrate when you complete each destination!
- Start giving to the work of the Lord. Giving should be a major part of our lifestyle. Look for ways to be generous with your time, talents, and money.

LIKE ANY JOURNEY, SOMETIMES YOU'LL TAKE TWO STEPS FORWARD AND ONE BACK. DON'T BE DISCOURAGED! JUST JUMP BACK ON THE PATH WHEREVER YOU ARE.

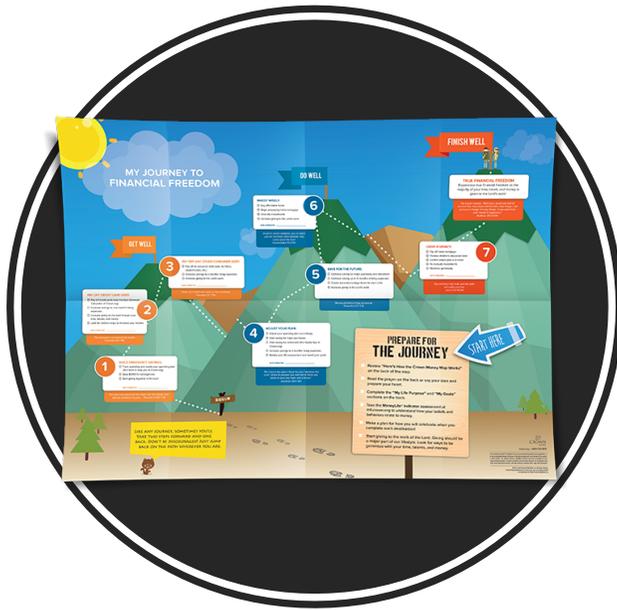
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MoneyLife®

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DESTINATION ONE

BUILD EMERGENCY SAVINGS



Session One: God's Part/Our Part

- Accepting God's Part and Our Part is the foundation for biblical stewardship
- Creating a spending plan is the foundation for all destinations in the Money Map
- \$1,000 in emergency savings will help break the credit card cycle
- Giving, saving and debt repayment can be accomplished simultaneously

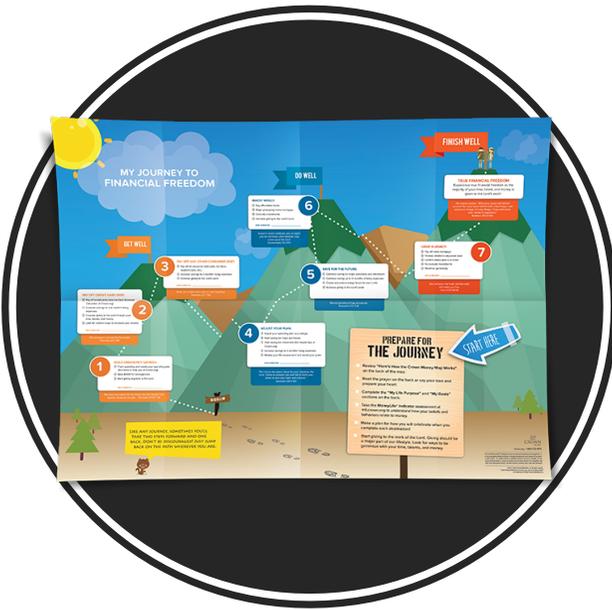
DESTINATION TWO

PAY OFF CREDIT CARD DEBT



Session Two: Becoming Debt Free

- Biblical financial principles and sound financial concepts can help clients make better financial decisions
- One month's living expenses will provide for a client if they lose their job
- Increasing margin will help the client increase giving, saving and debt repayment



**Session Three:
Contentment and Peace**

DESTINATION THREE

PAY OFF ANY OTHER CONSUMER DEBT

- Steady plodding brings prosperity
 - Proverbs 21:5 (TLB)
- Eliminating debt may be the most difficult, but also the most liberating of all financial decisions your client may ever make
- Three month's living expenses will provide for a client if they need medical leave

DO WELL

HOW CAN THE COACH GUIDE THE CLIENT ON THE PATHWAY TO
“DO WELL” TO “FINISH WELL”?

PRESENTED BY: MARILYN BUTLER



TRANSITION POINT

Be Aware

Push Forward

Set Goals

Establish Boundaries

PATHWAY TO WELLNESS



- DESTINATION 4 - ADJUST
 - Adjust your Spending Plan
 - Save for major purchases & retirement
 - Increase your savings to 6 months of living expenses
 - Continue your Maintenance Plan

Continuing the Maintenance Plan

DO WELL!

List income & expense totals, by category, monthly.

Track variable income & expenses, by category.

Transfer money from variable savings to appropriate category.

Review total expenditures, by category, as needed,

Stop spending when category amount is spent.

EVALUATE

Assess category surplus or deficit amounts.

Examine year-to-date budget.

Analyze year-to-date actuals.

Evaluate year-to-date actuals to budget.

Review income & expense allocations as needed and annually.

Application -- Maintenance Plan

Crown Spending Tracker

- Budget Accountability
 - Monthly
 - Annually

You Need a Budget (YNAB)

- Category based
- Can be aligned to Crown Categories
- “Aligning YNAB to Crown Categories” video resource available in ***Resource Repository***



DO WELL  FINISH WELL

Destination
#5

Save for the Future



Destination
#6

Invest Wisely



Destination
#7

Leave a Legacy



TELLING MY STORY

PRESENTED BY PRISCILLA DOUGLAS

Provides a reason to
hope

Brings us closer
together

Learn from one
another's experiences

Builds trust in God's
Faithfulness!

“ The Lord says, “I
will guide you along
the best pathway for
your life. I will advise
you and watch over
you “

Psalms 32:8 NLT

*“TELLING
OUR
STORY”*

OMAR AND ARACELY



PROCESS FOR COLLECTING THE STORIES



Lesson Progress Overview

Lessons

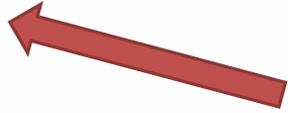


Name	Dates	Status	Order	
Getting Started	--	Published	<input type="text" value="0"/>	
Session 1 - God's Part / Our Part	--	Published	<input type="text" value="0"/>	
Session 2 - Becoming Debt Free	--	Published	<input type="text" value="0"/>	
Session 3 - Contentment and Peace	--	Published	<input type="text" value="0"/>	
Session 4 - Giving and Saving	--	Published	<input type="text" value="0"/>	
Session 5 - Family	--	Published	<input type="text" value="0"/>	
Session 6 - Conclusion	--	Published	<input type="text" value="0"/>	



Save

5.5 My Story



Instructions

Tell your experience of the course by answering the following questions.

Assignment: My Story

Complete Assignment to Mark This Item Complete.

Assignments



Show Category

All

Import

<input type="checkbox"/>	Name	Actions
<input type="checkbox"/>	Personal Information & Commitment Assignment is not date restricted	     
<input type="checkbox"/>	God's Part / Our Part Assignment is not date restricted	     
<input type="checkbox"/>	Debt Free Living Assignment is not date restricted	     
<input type="checkbox"/>	Contentment and Peace Assignment is not date restricted	     
<input type="checkbox"/>	Giving and Saving Assignment is not date restricted	     
<input type="checkbox"/>	Family Assignment is not date restricted	     
<input type="checkbox"/>	My Story Assignment is not date restricted	     

Review & Grade



My Budget Coach Training Story

Key:

Not Completed Completed Graded Requires Grading

All Students

Copy Excel PDF Column visibility

Show 50 entries

Search:

Learner	Started	Completed	Attempt	Status	Actions
Douglas Priscilla	No Date Assigned	No Date Assigned	1	Not Completed	
Learner					Actions

Showing 1 to 1 of 1 entries

Review Assignment

Print Test

Learner: Priscilla Douglas

Assignment : My Budget Coach Training Story

User Total Score

 Non Graded Question

1. Write down personal testimony of your own experience of the Budget Coach Training Course.

Student Answer

Print

2 pages

Destination

 Save as PDF 

Pages

All 

Layout

Portrait 

More settings 



Save

Cancel

➤ Click On the Budget Coach Management Smartsheet

➤ Fill in the Form

➤ Upload Your Story

➤ Submit

CROWN
Crown Budget Coach Client Tracker

In order to make sure that clients are linked to coaches we ask that as soon as you set your date for Getting Started lesson with a new client, when client need to pause or when the client completed the course update this form.

COACH CONTACT INFORMATION:

Coach First & Last Name * 

Coach Email * 

CLIENT CONTACT INFORMATION:

Client First & Last Name 

Client Email 

Status
Mark the status of your client.

Select or enter value 

Notes * 

Please add any notes regarding yourself or your client, such as ready for first client, the reason for a pause, the lesson completed prior to pause or a testimony when the course is completed.

Tell my Story

File Upload
Please upload your Client Agreement Form

Drag and drop files here or [browse files](#) 

Send me a copy of my responses

Submit 

Powered by  smartsheet



Please reach out to your
Team Leader with
questions regarding the
process.

THANK YOU!



Responses to Chat and Questions

Moderator: Alet Strydom

Thank you for Attending!

Next Quarterly Meeting:
January 20, 2022

Close in Prayer



CROWN™

Advancing God's Principles of Stewardship and Life