

Waiver

I voluntarily consent to receive financial coaching services from the NEXUS Financial Discipleship Center. I understand that services will be provided by a student of the NEXUS Financial Discipleship Center under the supervision of the NEXUS Financial Discipleship Center staff and faculty. Additionally, I understand that a faculty member may be involved in the supervision process. I further understand that Indiana Wesleyan University and the Ron Blue Institute for Financial Planning is a teaching institution, and I agree to be a part of the teaching program.

I understand that the student providing information is *not a licensed financial professional* and cannot recommend any investments, insurance, nor provide legal advice. If I feel that I need legal advice, I will contact Student Legal Services or an attorney.

Confidentiality Clause

Confidentiality is an important part of the coaching process, and we will carefully guard the information you entrust to us. There are three situations, however, when it may be necessary for us to share certain information with others: when a coach is uncertain of how to address a particular problem and needs to seek advice from a supervisor; when there is clear indication that others may be harmed unless others intervene; or when it becomes necessary to seek the assistance of others in the community to help you (with your permission). Please be assured that our coaches strongly prefer not to disclose personal information to others, and will make every effort to help you resolve a problem as privately as possible.

In the course of the NEXUS Financial Discipleship Center coaches providing financial coaching services to me, it may be necessary for my coach to discuss my financial information with his/her supervisor and creditors to whom I owe money.

The NEXUS Financial Discipleship Center is founded on biblical principles and biblical wisdom. The NEXUS Financial Discipleship Center coaches will be using the D.E.E.P. model within each meeting. You agree and understand that the coaching and education received will be biblical in nature and be presented using a biblical worldview.

I understand the educational purpose with which the NEXUS Financial Discipleship Center was created and know that my coaching sessions may be supervised. I also understand that questionnaires will be used to gather pertinent information; however, any identifying information will be anonymous. I voluntarily consent and agree to the use of my information for research and educational purposes.

By my signature (or the signature of my guardian) below, I do hereby release, indemnify, and hold harmless Indiana Wesleyan University and the Ron Blue Institute, its Board of Trustee and Board of Managers respectively, University officers, agents and employees, and students of the NEXUS Financial Discipleship Center from any and all liability of any type whatsoever arising from any acts or omissions, negligent or otherwise, by Indiana Wesleyan University officers, agents, employees, volunteers, or students relating to the NEXUS Financial Discipleship Center.

If I have any questions or concerns now or in the future, I understand that I should consult with my financial coach or the director of the program, Dr. Justin M Henegar, CFP®, ChFC®, CRPC®, at 765-677-1934 or Justin.Henegar@indwes.edu. I certify that this form has been fully explained to me, and that I have read it or had it read to me*, and that I understand its contents.

Printed Name

Signature (guardian, if under legal age)

Date

This form was presented and signed before me on _____ by _____.

Printed Name of Coach

Date

Signature of Financial Coach