

# Checklist For Starting a Financial Coaching Business

## Business Planning

- Define your target audience
- Analyze competitor offerings
- Develop unique services

## Legal and Regulatory

- Register your business
- Obtain necessary licenses
- Adhere to financial advisory laws

## Financial Setup

- Open a banking account
- Set pricing structures
- Plan for taxes and insurance

## Educational and Certification

- Obtain relevant certifications
- Stay updated with regulations
- Engage in continuous education

## Marketing

- Build a professional website
- Utilize social media marketing
- Network through seminars

## Client Management

- Implement scheduling software
- Use financial planning tools
- Maintain client confidentiality

## Service Delivery

- Offer one-on-one coaching sessions
- Develop group workshops
- Create digital resources and tools

## Go-to Resources for Starting a Financial Coaching Business

### Financial Planning

- [eMoney Advisor](#)
- [MoneyGuidePro](#)
- [RightCapital](#)

### Educational Resources

- [NAPFA](#)
- [FPA](#)

### Business & Accounting

- [ZenBusiness](#)
- [Northwest Registered Agent](#)
- [FreshBooks](#)
- [MyCorporation](#)

### Useful Tools

- [Logo Generator](#)
- [Invoice Generator](#)
- [Domain Name Search](#)

\*All of the resources are clickable links