Abundance & Wealth Mindset

5-Session Coach + Client Worksheet Package

Designed as a folder-ready coaching pathway. Each session has a coach sheet and a client sheet, followed by a progress/review page.

Frameworks used: Powerful Questions / 51 Curious Questions, LAST, Feelings Inventory, Core Values, Intentional Change Theory, Experiences–Growth–Contribution, LERR, AWESOME goals, Lofty Questions and accountability.

Scope note: These worksheets support coaching conversations. For relationship concerns involving abuse, coercion or immediate safety concerns, use appropriate professional/safety resources rather than treating the worksheet as a substitute for them.

Session 1 — Coach Sheet

Theme: Define abundance

Session objective

Clarify what abundance means personally rather than assuming a definition.

Opening / Powerful Question

What is success for you?

Follow-up question

What is your motive to take action?

LAST prompts

LISTEN — What words, energy or shifts do I notice?
ACKNOWLEDGE — What can I reflect back without adding my interpretation?
SENSE — What may be happening beneath the words?
TEST — What question could gently challenge or expand awareness?

Coach observations / patterns / strengths

Client insight or realization

Action / experiment / accountability

Session 1 — Client Sheet

Today's theme: Define abundance

Opening question

What is success for you?

My response

Explore

What is your motive to take action?

What I notice / understand

Feelings check-in

Circle or write feelings that fit: calm • curious • confident • hopeful • grateful • inspired • joyful • peaceful • afraid • worried • frustrated • angry • sad • confused • overwhelmed • other: _____

What am I feeling? What might matter underneath it?

Lofty Question

What would abundance allow you to experience?

My answer in the present tense

One action I commit to before the next session

Session 2 — Coach Sheet

Theme: Money stories

Session objective

Explore beliefs and stories connected to money, success and possibility.

Opening / Powerful Question

What do you believe in?

Follow-up question

Is it true?

LAST prompts

LISTEN — What words, energy or shifts do I notice?
ACKNOWLEDGE — What can I reflect back without adding my interpretation?
SENSE — What may be happening beneath the words?
TEST — What question could gently challenge or expand awareness?

Coach observations / patterns / strengths

Client insight or realization

Action / experiment / accountability

Session 2 — Client Sheet

Today's theme: Money stories

Opening question

What do you believe in?

My response

Explore

Is it true?

What I notice / understand

Feelings check-in

Circle or write feelings that fit: calm • curious • confident • hopeful • grateful • inspired • joyful • peaceful • afraid • worried • frustrated • angry • sad • confused • overwhelmed • other: _____

What am I feeling? What might matter underneath it?

Lofty Question

Which belief deserves a closer look?

My answer in the present tense

One action I commit to before the next session

Session 3 — Coach Sheet

Theme: Values and choices

Session objective

Connect financial choices with values, priorities and desired experiences.

Opening / Powerful Question

What are you focused on?

Follow-up question

What is the outcome you are looking for?

LAST prompts

LISTEN — What words, energy or shifts do I notice?
ACKNOWLEDGE — What can I reflect back without adding my interpretation?
SENSE — What may be happening beneath the words?
TEST — What question could gently challenge or expand awareness?

Coach observations / patterns / strengths

Client insight or realization

Action / experiment / accountability

Session 3 — Client Sheet

Today's theme: Values and choices

Opening question

What are you focused on?

My response

Explore

What is the outcome you are looking for?

What I notice / understand

Feelings check-in

Circle or write feelings that fit: calm • curious • confident • hopeful • grateful • inspired • joyful • peaceful • afraid • worried • frustrated • angry • sad • confused • overwhelmed • other: _____

What am I feeling? What might matter underneath it?

Lofty Question

What matters most about the result you want?

My answer in the present tense

One action I commit to before the next session

Session 4 — Coach Sheet

Theme: Mindset to action

Session objective

Turn insight into a practical experiment and identify support.

Opening / Powerful Question

What is the small step you can take towards this big dream?

Follow-up question

Do you ask when you need help?

LAST prompts

LISTEN — What words, energy or shifts do I notice?
ACKNOWLEDGE — What can I reflect back without adding my interpretation?
SENSE — What may be happening beneath the words?
TEST — What question could gently challenge or expand awareness?

Coach observations / patterns / strengths

Client insight or realization

Action / experiment / accountability

Session 4 — Client Sheet

Today's theme: Mindset to action

Opening question

What is the small step you can take towards this big dream?

My response

Explore

Do you ask when you need help?

What I notice / understand

Feelings check-in

Circle or write feelings that fit: calm • curious • confident • hopeful • grateful • inspired • joyful • peaceful • afraid • worried • frustrated • angry • sad • confused • overwhelmed • other: _____

What am I feeling? What might matter underneath it?

Lofty Question

What is one executable step?

My answer in the present tense

One action I commit to before the next session

Session 5 — Coach Sheet

Theme: Sustainable direction

Session objective

Review learning, experiments and future possibilities without prescribing a financial decision.

Opening / Powerful Question

What promise does the future hold?

Follow-up question

How do you deal with 'new'?

LAST prompts

LISTEN — What words, energy or shifts do I notice?
ACKNOWLEDGE — What can I reflect back without adding my interpretation?
SENSE — What may be happening beneath the words?
TEST — What question could gently challenge or expand awareness?

Coach observations / patterns / strengths

Client insight or realization

Action / experiment / accountability

Session 5 — Client Sheet

Today's theme: Sustainable direction

Opening question

What promise does the future hold?

My response

Explore

How do you deal with 'new'?

What I notice / understand

Feelings check-in

Circle or write feelings that fit: calm • curious • confident • hopeful • grateful • inspired • joyful • peaceful • afraid • worried • frustrated • angry • sad • confused • overwhelmed • other: _____

What am I feeling? What might matter underneath it?

Lofty Question

What direction do you want to keep exploring?

My answer in the present tense

One action I commit to before the next session

Abundance & Wealth Mindset — Progress & Review

Use after Session 5 to capture learning and the client's chosen direction.

Biggest insight across the 5 sessions

What has changed in my thinking, feelings or behavior?

Strengths and resources I discovered

What I want to continue practicing

Who / what can support me

My next 30-day commitment

My next coaching focus

Client's own definition of success going forward:

In my own words