

Financial Mentoring Service

iosis
transforming
family life for good



Trained financial mentors use a strength-based approach to help families navigate financial and support systems to meet their needs.

www.iosis.org.nz

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About the Financial Mentoring Service

Do you have on-going questions, concerns or challenges around money? Or do you have an immediate financial crisis that requires assistance? A financial mentor can help you to assess your needs and identify your aspirations. Together you will develop a strengths-based financial plan to help you achieve your goals and reduce any immediate pressure. This simple paper-based plan is easy to update and will help you keep your plan front of mind.

How it Works

We believe you are the experts in your life and, as such, you have control over your journey to becoming financially capable and resilient. A financial mentor will help you understand your financial position, and guide you in developing a financial plan. This plan will be used to record your short, medium and longer term goals. It will also be a record of the conversations between you and your financial mentor as you discuss a range of topics, including the broader support you may need to achieve your goals. The financial mentor will help you share and engage with others in your journey (e.g. government agencies, banks).

Length of Service

There is no maximum number of visits with your financial mentor.

Cost

This service is free.

Referrals

Referrals can be made by anyone – self, family, doctors, lawyers, teachers, social workers, Oranga Tamariki.

Contact the Iosis office to make a referral.