



# One-on-One Coaching Services

## What is coaching?

By working one-on-one with a coach, you embark on a proactive inquiry process to deepen self-awareness of your talents, strengths, and hurdles. You create a vision for your life and work, and generate your own plan and solutions to get there. The coach provides structure and keeps you focused on your most important life goals. Coaching calls take place 3-4 times per month, from any location where you have phone access. Each week, the coach serves as your advocate and sounding board, holding you accountable to your plan. You could get there on your own - but a coach helps you overcome barriers, resolve dilemmas, and get there faster.

## Who can benefit from coaching?

- Donors exploring their money, work, and life purpose, including individuals and couples with new wealth
- Foundation leaders and trustees
- Retirees exploring volunteering and philanthropy
- Nonprofit leaders
- Socially responsible entrepreneurs
- Twenty- and thirty-somethings articulating their career and personal goals

## How might you use a coach?

- Establish big goals for your philanthropic work
- Identify how to best make a difference with your wealth
- Pursue a life dream or a new career that you've put off or have thought of as "too big"
- Create balance between your work and personal life
- Match your day-to-day reality with your bigger vision
- Lead your organization to greater levels of success

- over -



# One-on-One Coaching Services

## Why Philanthropy Vision?

Philanthropy Vision's coaches have had rich, extensive careers in the philanthropic and nonprofit worlds, including family philanthropy. They believe passionately in each person's ability to make a difference. They are also well versed in the personal dreams and challenges faced by families with wealth as well as by foundation and nonprofit leaders. Their coaching clients have included donors, retirees, individuals and families starting new businesses, nonprofit executives, and young people sorting out all of their life choices.

*"I'm moving forward with my bigger-than-life dreams. [Philanthropy Vision's] coaching provides a supportive environment for exploring my life purpose."*  
- PV client

## Coaches

*"warm"*

*"incisive"*

*"brilliant"*

### **Lisa Tracy**

Lisa's extensive experience includes careers as an activist, nonprofit executive, grantmaker, financial advisor, and philanthropic advisor. Lisa's work has had a profound impact on Russia's environmental movement. She most enjoys working with people who have a burning desire to change the world. Lisa has taken risks to create precisely the life she wants, and now she loves helping others do the same. She completed her coaching certification at the NLP and Coaching Institute of California, a program accredited by the International Coach Federation.

*"fun"*

*"creative"*

*"deep"*

### **Miles Smith**

Miles is a coach and philanthropic advisor specializing in community leadership, sustainability, donor engagement, and family philanthropy. He listens to the goals and dreams that already reside inside each of us. Collaborating with each client, he helps create bold ways to achieve those goals and dreams. He believes that coaching should be fun, creative, and profound. Miles has also been an entrepreneur and acts as a trustee to his own family's foundation - so he particularly likes coaching philanthropists and socially responsible entrepreneurs. Miles received his coaching training at Falling Awake's Life Coach Program.

- over -