

# Small Dollar Loan Referral Cheat Sheet

Indicate the referral in ETO: In the **Financial Coaching Session** touchpoint, under “What did you work on today?” check small dollar loan referral, then choose the method that best describes the referral.

What did you work on today?

- Debt reduction
- Improve credit
- Create and follow budget
- Increase savings
- Stabilization
- Emergency resources
- Small dollar loan referral
- Other



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Small dollar loan referral:

- Fresh Start loan
- CGF
- Esusu
- Oportun

Referral actions:

- Shared link to loan application ([https://financial-coaching-resources.weebly.com/uploads/4/6/3/7/46373843/small\\_dollar\\_loan\\_cheat\\_sheet.pdf](https://financial-coaching-resources.weebly.com/uploads/4/6/3/7/46373843/small_dollar_loan_cheat_sheet.pdf))
- Answered questions about application and/or loan
- Started application together
- Completed application together
- REQUIRED:** Created at least one goal TouchPoint in ETO

**Don't forget to create at least one goal TouchPoint in ETO!**