

PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE _____

PERSONAL INFORMATION

Your Name _____ Age _____ Type of Work _____

Spouse Name _____ Age _____ Type of Work _____

Have you ever budgeted? ☐ Yes ☐ No ☐ What's FPU? Number of Children or Other Dependents _____

Mailing Address _____ City _____ State _____

ZIP _____ Phone _____ Email _____

Preferred method of contact for your session? ☐ In Person ☐ Phone ☐ Video Conference

INCOME

What is your monthly net take-home pay? _____

Do you have an irregular income? ☐ Yes ☐ No

Do you use a monthly budget? ☐ Yes ☐ No

SAVINGS

Do you have an emergency fund? ☐ Yes ☐ No

▶ How much is in the fund? _____

Are you currently investing for retirement? ☐ Yes ☐ No

▶ What is your balance? _____

▶ What is your monthly contribution? _____

Do you contribute to non-retirement savings? ☐ Yes ☐ No

▶ What is your balance? _____

▶ What is your monthly contribution? _____

HOUSING

Do you rent or own? ☐ Rent ☐ Own

▶ Are you current on your payment? ☐ Yes ☐ No

▶ What are the total monthly payments? _____

CONSUMER DEBT

Do you have any vehicle loans? ☐ Yes ☐ No

▶ Are you current on vehicle payments? ☐ Yes ☐ No

▶ What are your total monthly payments? _____

List any total balances due:

▶ Credit Cards _____

▶ Student Loans _____

▶ Taxes _____

▶ Other _____

WHAT PRIMARY ISSUE SHOULD WE FOCUS ON DURING YOUR COACHING SESSION?

☐ Budgeting ☐ Real Estate ☐ Dealing With Collectors ☐ Wealth Building/Investing ☐ Debt Elimination
☐ Other

LIST THE TOP THREE CONCERNS/QUESTIONS RELATED TO YOUR ABOVE SELECTION: