

# PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE \_\_\_\_\_

## PERSONAL INFORMATION

Your Name \_\_\_\_\_ Age \_\_\_\_\_ Type of Work \_\_\_\_\_

Spouse Name \_\_\_\_\_ Age \_\_\_\_\_ Type of Work \_\_\_\_\_

Have you been through FPU?  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: