

CREATE INCOME FINANCIAL QUESTIONNAIRE

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Financial Management Strategies

Assess your money habits to determine your Create Income readiness. Answer truthfully, so we may know what steps will be required to begin to change your life experience with money. Looking forward to serving you!

Jamila Harris, Create Income Coach

- Yes No 1. Do you save money from your present income on a regular basis?
- _____ 2. If you answered yes to #1, write how Much and with what frequency (for example: \$25 per month)
- Yes No 3. Do you have more than one source of income?
- Yes No 4. Do you have a written budget?
- Yes No 5. Do you have more than \$200 per month in payments for consumer credit items, such as credit cards, car loans, personal loans?
- Yes No 6. Do you have more than \$100 per month in payments for school loans, school tuition, medical bills?
- Rent Own 7. Do you rent or own your home?
- _____ 8. If you have a mortgage, do you have rental income or do you have a single-family dwelling?

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- Yes No 9. Do you file an income tax return every year?
- Yes No 10. Do you understand tax deductions and how to benefit from the tax system?
- Yes No 11. Do you participate in a 401(k) or 403(b)?
- Yes No 12. Do you invest money?
- Yes No 13. Do you have written financial goals for this year, next year, 5 years, 10 years from now?
- Yes No 14. Do you eat meals from restaurants or outside of your home each week?
- _____per_____ 15. If you answered yes to #14, how many meals per day or per week do you eat out?
- __Adults__Meals 16. How many members of your family eat out each week? How many meals each?
__Kids__Meals
- \$_____/month 17. How much discretionary income do you spend every month for hair, nails, clothes, shoes, entertainment?
- \$_____ 18. How much have you spent for automobile repairs this year?
- Yes No 19. Do you have a specific dream you want to accomplish that you have not started because it requires money?