PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE_____

our Name		Age	Type of Work		
pouse Name	Age	Type of Work			
Have you been through FPU? O Yes O No O What's FPU?			Number of Children or Other Dependents		
1ailing Address			City	State	
[IP Phone		Email			
referred method of contact for your session?	O In Person OP	hone O Video Con	ference		
NOONE		LIGHTSING			
NCOME		HOUSING	own? O Rent O Own		
What is your monthly net take-home pay? Oo you have an irregular income?	O Yes O No	Do you rent or ► Are you cu	rrent on your payment? (
o you use a monthly budget?	O Yes O No	► What are t	► What are the total monthly payments?		
SAVINGS	0 0	CONSUME	R DEBT		
Do you have an emergency fund? How much is in the fund?	O Yes O No	Do you have ar	y vehicle loans? O Yes	ONo	
are you currently investing for retirement?	O Yes O No	► Are you cu	rrent on vehicle payments?	O Yes O No	
► What is your balance?	————	► What are y	our total monthly payments	;?	
► What is your monthly contribution?		List any total b	alances due:		
o you contribute to non-retirement savings? What is your balance?	O Yes O No	► Credit Card ► Student Lo	_		
► What is your monthly contribution? _		► Taxes			
		► Other			
WHAT PRIMARY ISSUE SHOU	LD WE FOCUS	S ON DURING	YOUR COACHING	SESSION?	
O Budgeting O Real Estate O Dealin	ng With Collectors	O Wealth Building	/Investing O Debt Elimina	ation	
IST THE TOP THREE CONCERN	S/QUESTIONS	DEL ATEN TO V	OUD AROVE SELECT	ION:	
121 106 108 10866 (1)11 6811	3/ QUE3 IUN3	RELATED TO	OUR ABOVE SELECT	ION:	