



Pride and Properties

Name:
Identify as:

Date:
Marital Status:

Age:
Children:

Note: Please do NOT Include your SSN, Account Numbers, or Institutions where money is kept.

Emotions

Are you happy with the current state of your finances?

Where do you want to focus? Check all that apply:

Retirement?__Increase Income?__Estate Planning?__Eliminating Debt?__Long Term Care?
Estate Preservation?__Asset Protection?__Real Estate?__Stocks?__

Does talking about money make you uncomfortable?

Do you have a partner that takes care of your emotional well being? (Answer however you feel this question might mean, or feel relevant to you.)

Do you feel safe at home?

Nurtured?

Are you safe?

Do you feel safe?

Does someone yell at home?

Do you have someone managing money? (Paying bills, etc.)

Do you and your partner share money?

Do you have credit card balance?

How much?

Does your partner know?

Do you have a plan to be debt free?

How does this amount of debt make you feel?

DTI Ratio

1) Add all minimum monthly payments, (All credit cards, rent, car payments, etc.) _____

2) Total money received monthly, (Salary, dividends, commissions, alimony, etc.) _____

Divide the first line from the second line. Put that number here. _____

Multiply by 100. _____

Inventory of debt

	Total Pay Off Bal?	Min Amt Due	Amt You Pay	Interest Rate	Acct Stil Active
Credit Card 1					Y or N
Credit Card 2					Y or N
Credit Card 3					Y or N
Credit Card 4					Y or N
Other line of credit					Y or N

Property 1:

How is this property titled?

How Many Units?

Balance: _____ Monthly Payment: _____ PMI: Y or N Interest: _____ Principle _____

Escrow Acct? _____ HELOC? _____ Lien? _____ Date Purchased? _____

Equity

Zillow: _____ Redfin: _____ Realtor: _____

Property 2:

How is this property titled? _____ How Many Units? _____
Balance: _____ Monthly Payment: _____ PMI: Y or N Interest: _____ Principle _____
Escrow Acct? _____ HELOC? _____ Lien? _____ Date Purchased? _____
Equity _____
Zillow: _____ Redfin: _____ Realtor: _____

Auto Loan: Balance: _____ Payment? _____ Interest? _____

Auto Loan: Balance: _____ Payment? _____ Interest? _____

IRS Debt?

Depreciation?

Mortgage Notes?

Judgements?

Have you ever been incarcerated?

Convicted/Charged of a crime?

Do you have health Ins?

Does Someone At Home: Yell At You?

Over Imbibe?

Have You Ever

Been Threatened?

When Was the last time the police came to your house?

Have you ever been Hit/Struck/Slapped/Punched?

Pushed Down?

Has a partner ever thrown objects at you?

Are you in therapy?

Do have a 401(k)IRA loan?

Student Loan(s)?

Filed Bankruptcy in the last 10 years?

Assets

Salary?

Investment?

Rental?

Dividend Income?

IRA? Y or N

Roth or Traditional?

Other?

Balance:

Pension?

Annuity?

Mineral Rights?

401(k)?

403(b)?

457(b)?

Social Security?	VA?	Disability?
Alimony?	Child Support?	529?
529? (Under your custodianship?)		
Checking?	Saving?	CD?
Money Market?	Mutual Fund?	Stocks?
Bonds?	Royalties?	Life Insurance?
Work Comp?	(Pending) Lawsuit?	Cash?
Real Estate?	REIT?	Crypto Currency?
Secret Bank Acct(s)?	Debts owed to you?	Own a business?
Inheritance?	Gifts?	Art/Antiques?
Jewelry/coins?	Government Securities?	Other?
Profit Sharing?	Safe Deposit Box?	MediCal/Medicare

Later In Life

Do you have a will?	Do you have a Trust?
Do you have an attorney?	Specializes in?
Do you have a CPA?	
Do you have health insurance?	How is this ins obtained?
Are you in therapy?	For how long?
Do you have Power of Attorney set up for you or your partner?	
Do you have an After Life Plan?(Burial/Cremation)	Funeral Arrangements?
Do you have an ADR (Advanced Care Directive)?	
Do you have Long Term Care Ins?	

Who will take care of you when you're older? Take you to Dr appts? Send you supplies (Depends)? Refill your meds? Take care of your other needs when you become incapacitated?

Have you let your needs/wants/wishes known to this/these person/people?

Do you think about leaving your partner?

Inventory

Do you consider yourself a day trader? Do you gamble? Have you ever held a trade for less than 30 days?

Are you religious? Attend Church?

Are you in an open relationship?

Do you or your partner have/had extra marital activities?

Do you suffer from anxiety, depression, or insomnia?

Who handled the finances when you were growing up?

Have you been Abused? Or experienced childhood trauma?

Is there anything else you would like me to know?

How do you divvy up household chores?

Do you pay for a house keeper?

Does your partner work? Who is the bread winner?

Do you have pets? What would you like to see happen to you pets, in the event of death, or severe impairment?

FSA/HSA? Has your partner hid financial things from you?

Do you enjoy cooking?

How often do you eat out?

Have you found your partner made financial decisions without telling you?

Do you follow a monthly budget? Do you keep track of your daily expenses?

Do you have a thousand dollars cash to use incase of an emergency?

In the past year have you ever been late on a bill? Or been overdrawn on your bank account?

Do you anticipate an inheritance?

Do you think about leaving your partner?

How long do you think you can work in your industry?

When would you like to retire?

What is your estimated life expectancy?

Do you have any health concerns?

Do you owe taxes every year?

Are you in collections?

Where do you plan to retire?

Is anyone in your household dealing with a disability/limitations?

Do you donate money?

Would a loss of a partner's income make monthly expenses difficult?

Are you able to save any money?

What financial goals would you like to achieve over the next 5 years?

Is there anything you want hidden from partner/family in the event of our death? Have you made these arrangements?

Life Values	Very Important	Somewhat Important	Not Important
Change and Variety			
Travel			
Creativity			
Nature			
Financial Security			
Financial Reward			
Financial Independence			

To Be Challenged			
Self Improvement			
Physical Fitness			
Healthy Lifestyles			
More down time			
Leisure/Hobbies			
Aesthetics/Beauty			
Material Possessions			
Volunteer			
Bond with Partner			
Set Schedule/ Routine			

Documents

Circle One	(1= least important/False, 5=Important/Accurate)				
I can talk to my partner about our finances	1	2	3	4	5
I'm afraid of what the future holds	1	2	3	4	5
I can ask where we have money	1	2	3	4	5
We frequently talk about hopes and dreams	1	2	3	4	5
I feel my partner and I are business partners	1	2	3	4	5
I feel we are equal	1	2	3	4	5
I am angry or resentful	1	2	3	4	5
I feel satisfied in my current position at work	1	2	3	4	5
I'm afraid of running out of money during retirement	1	2	3	4	5
I feel I am equal to my partner	1	2	3	4	5

Do you have the following documents readily available in the event of an emergency?

Divorce Decree?

Immigration Declaration?

Birth Certificate?

Social Security Card?

Marriage License?

Medicaid/MediCal Card?

Passport?

Military Discharge Papers?

Vaccination Records?

Power Of Attorney?

What are your Strong Suits?

Partner: Weaknesses?

Partner: Strong Suits?

What is most important to you?

How can I help you the most?

What is your biggest fear (financially)?

What do you feel is your biggest financial drain?

After completion write down how you feel below:

~Numbers Are Black and White. Money is Emotional.