

PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE _____



PERSONAL INFORMATION

Your Name _____ Age _____ Type of Work _____

Spouse Name _____ Age _____ Type of Work _____

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: