Financial Snapshot

Session Date: Click or tap to enter a date. Time: Click or tap here to enter text.

**PERSONAL INFORMATION**

Name(s): Click or tap here to enter text.

Age(s):Click or tap here to enter text.

Occupation(s): Click or tap here to enter text.

Number of Children/Dependents: Click or tap here to enter text.

Mailing Address: Click or tap here to enter text. City:Click or tap here to enter text. State:Click or tap here to enter text.

Preferred method of session?  In Person  Phone  Video Conference

**TOPICS TO COVER**

Rank these topics in order of what you’d like to discuss (1 most important to 8 least important)

Retirement: Ranking

Saving: Ranking

Investing: Ranking

Debt Elimination: Ranking

Budgeting: Ranking

Real Estate/Housing: Ranking

Building Credit: Ranking

Other: Ranking

**HOUSING**

Do you currently rent or own your home? Rent Own

If renting, what is your monthly rent payment (including utilities): Click or tap here to enter text.

If owned, what is your monthly mortgage (Include PMI):Click or tap here to enter text.

**INCOME**

What is your monthly net take-home pay? Click or tap here to enter text.

Is your income irregular? Yes No

Do you currently follow a monthly budget? Yes No

**SAVINGS**

Do you have an emergency fund? Yes No

If yes, how much? Click or tap here to enter text.

Are you currently saving for retirement? Yes No

If yes, how much have you saved? Click or tap here to enter text. (Include Roths and 401ks.)

If yes, what are you contributing monthly? Click or tap here to enter text.

Do you have non-retirement savings? (HSA, Brokerage Accounts, Real Estate, etc) Yes No

If yes, how much? Click or tap here to enter text.

Would you like to include religious topics in your coaching, such as tithing and biblical aspects on finance? Yes No

**DEBT TABLE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Debt Class**  (House, Vehicle,  Credit Cards,  Student Loans, family loans, etc.) | **Outstanding**  **Amount ($)** | **Percent Interest + Interest Type** (Fixed  or Floating) | **Life of Debt/Loan**  **Term** |
| **House:**  Click here to type | Click here to type | Click here to type | Click here to type |
| **Vehicles:**  1. Click here to type  2. Click here to type  3.Click here to type | 1.  2.  3. | 1.  2.  3. | 1.  2.  3. |
| **Credit Cards:**  1. Click here to type  2. Click here to type  3. Click here to type  4. Click here to type | 1.  2.  3.  4. | 1.  2.  3.  4. | 1.  2.  3.  4. |
| **Student Loans:**  Federal: Click here  Private: Click here | F.  P. | F.  P. | F.  P. |
| **Other:** Click here | Click here | Click here | Click here |
| **Other:** Click here | Click here | Click here | Click here |
| **Other:** Click here | Click here | Click here | Click here |
| **Other:** Click here | Click here | Click here | Click here |