

Date _____

REQUEST FOR BUDGET COACHING

Personal Information

Name _____ Spouse _____

Address _____ City _____ Zip _____

Phone: (home) _____ (work) _____ (cell) _____

E-mail _____

Age Group: 20s 30s 40s 50s 60s+

Never Married Married Years Married _____ Separated Divorced Widowed

Ages of children _____ Number at home ____ Adult children at home _____

Education: Yourself _____ Spouse _____

What church do you attend? _____ Member? _____ How often attend? _____

Do you know Jesus Christ as your Lord and Savior? _____

Have you met with any of our pastors for counseling or assistance? _____

(If yes, add name and when) _____

Who referred you for financial counseling? _____

Are you willing to follow Christian principles and obey God's commands as revealed through budget coaching?

Yes _____ No _____

Do you own a small business? _____ Name of business _____

Briefly describe your business _____

Financial Goals and Concerns Information

What goals do you want to accomplish as a result of this counseling (get out of debt, develop a working budget, start a savings plan, how to invest, etc.)? _____

Spouse's goals: _____

Have you every met with a budget coach before? Yes _____ No _____

If so, who and when? _____ Date _____

List areas of concern as you see them now (impulse buying, lack of income, no budget, abuse of credit, etc.)

Spouse's answer: _____

Additional comments that will help pair you with a budget coach or prepare the coach for their meeting with you:

Employment Information

Employer _____ Mo/Yrs ___ Occupation _____ Annual Income _____

Spouse
Employer _____ Mo/Yrs ___ Occupation _____ Annual Income _____

Bank, Assets, Misc. Information

Do you know how to reconcile your checkbook to your monthly statement Y _____ N _____

Has your checkbook been reconciled (to the penny) to your bank statement in the last 30 days? Y ___ N ___

Checking Account Balance \$ _____ Credit Union(s) \$ _____
Savings Account Balances \$ _____ Other \$ _____

Does your employer have a payroll deduction plan for any of the following?

Savings Stocks Insurance Investments Loans IRA 401K/403B

How much? _____

Are you currently participating in any savings, retirement or investment plans and if so, what are they?

Y _____ N _____ Which ones? _____

Describe any other assets you have, i.e., stocks, bonds, IRAs trusts, real estate

Do you have a current will? Y _____ N _____

Have you ever filed for bankruptcy? Y _____ N _____

Residence Information

Renting _____ Buying _____ Lease Option _____ Other _____

If buying: Purchase price _____ Current Market value _____ Date Bought _____

	<u>Balance</u>	<u>Payment</u>	<u>Interest Rate</u>	<u>Fixed / Adj.</u>	<u>Final Date Due</u>
1 st Mortgage	_____	_____	_____	_____	_____
2 nd Mortgage	_____	_____	_____	_____	_____

Do you have the house for sale? _____ How long on the market? _____

Are the payments: Current? _____ Behind? _____ How many are due? _____

Automobiles

Year, make, model _____ Value _____ Balance owed _____
Year, make, model _____ Value _____ Balance owed _____

FINANCIAL STATEMENT, ASSETS AND LIABILITIES

ASSETS

Liquid Assets _____
Checking Account _____
Savings Account _____
Money Markets _____
Certificates _____
D's _____

Total Liquid Assets _____

LIABILITIES

Credit Cards _____
1st Mortgage _____
2nd Mortgage _____
IRS Past Due _____
1st Car _____
2nd Car _____
Student Loan _____

Total Liabilities _____

INVESTED ASSETS

IRA _____
SEP _____
Stock _____
Gold Coin _____
401K _____
403B _____

Total Invested Assets _____

USE ASSETS

1st Car Value _____
2nd Car Value _____
Residence Value _____
Personal Items _____
2nd Home Value _____

Total Use Assets _____

TOTAL ASSETS _____

List everything of value, motor home, golf cart, time share, land, deferred income.
List any debts, parents, schools, etc.

Thank you. You should be hearing from a budget coach as soon as possible.