PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE

PERSONAL INFORMATION

Your Name	Age	Type of Work	
Spouse Name	Age	Type of Work	
Have you been through FPU? O Yes O No O What's FPU?	Number of Ch	Number of Children or Other Dependents	
Mailing Address	City	y State	
ZIP Phone	Email		
Preferred method of contact for your session? O In Person O Phone	O Video Confere	ence	

INCOME HOUSING Do you rent or own? O Rent O Own What is your monthly net take-home pay?___ ► Are you current on your payment? O Yes O No O Yes O No Do you have an irregular income? What are the total monthly payments? O Yes O No Do you use a monthly budget? **SAVINGS** CONSUMER DEBT O Yes O No Do you have an emergency fund? O Yes O No Do you have any vehicle loans? ► How much is in the fund? ► Are you current on vehicle payments? O Yes O No O Yes O No Are you currently investing for retirement? What are your total monthly payments? • What is your balance? What is your monthly contribution? List any total balances due: Credit Cards Do you contribute to non-retirement savings? O Yes O No ► What is your balance? Student Loans What is your monthly contribution? Taxes Other ______

WHAT PRIMARY ISSUE SHOULD WE FOCUS ON DURING YOUR COACHING SESSION?

O Budgeting

O Real Estate O Dealing With Collectors O Wealth Building/Investing

O Debt Elimination

O Other

LIST THE TOP THREE CONCERNS/QUESTIONS RELATED TO YOUR ABOVE SELECTION: