



**PERSONAL INFORMATION**

Your Name \_\_\_\_\_

Age \_\_\_\_\_ Type of Work \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Spouse Name \_\_\_\_\_

Age \_\_\_\_\_ Type of Work \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Have you been through FPU? Yes No What's FPU?

Number of Children or Other Dependents \_\_\_\_\_(ages)

Mailing Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Preferred method of contact for your session? Please circle your choice: In Person Phone Zoom Video

**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

**HOUSING**

Do you rent or own? Rent Own

Are you current on your payment? Yes No

What are the total monthly payments?

## 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?

## CONSUMER DEBT

Do you have any vehicle loans? Yes No

Are you current on vehicle payments? Yes No

What are your total monthly vehicle loan payments?

List any total balances due:

Credit Cards:

Student Loans:

Taxes:

Other Loans/Credit:

**What primary issue should we focus on during your initial coaching sessions?** Please circle:

Budgeting

Real Estate

Dealing With Collectors

Wealth Building/Investing

Debt Elimination

Other:

**Briefly describe any other financial concerns, if any, that keep you up at night or information that will help us help you gain financial peace:**