

# FINANCIAL SNAPSHOT WORKSHEET



*Understand the Situation · Provide Information · Inject Hope*

In order to make the best use of your time during your one-on-one financial coaching session, please help us understand your current situation by providing the following information. Know that any information you provide is completely confidential and will not be shared with anyone.

**Office Use Only**

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## Personal Information

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Place of Work \_\_\_\_\_ Type of Work \_\_\_\_\_

Annual Gross Income \_\_\_\_\_ Monthly Take Home Pay \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Place of Work \_\_\_\_\_ Type of Work \_\_\_\_\_

Annual Gross Income \_\_\_\_\_ Monthly Take Home Pay \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Alternate Phone \_\_\_\_\_

Email \_\_\_\_\_ Best Method of Contact \_\_\_\_\_

Address \_\_\_\_\_  
Street City State Zip Code

## Financial Information

How many dependents living at home? \_\_\_\_\_ Ages? \_\_\_\_\_

Do you rent or own your home? \_\_\_\_\_ Monthly payment? \_\_\_\_\_ Approximate value of your home? \_\_\_\_\_

What is the total debt on your home? \_\_\_\_\_ Any auto loans? \_\_\_\_\_ How many? \_\_\_\_\_ Total amount? \_\_\_\_\_

Do you have a working monthly budget? \_\_\_\_\_ Do you save money on a regular basis? \_\_\_\_\_

Did you receive a tax refund last year? \_\_\_\_\_ If so, how much? \_\_\_\_\_

Do you currently contribute to retirement? \_\_\_\_\_ Do you have cash value (whole) or term life insurance? \_\_\_\_\_

Approximate total of all other debt (student/personal loans, credit cards, family loans, etc.) \_\_\_\_\_

What specific issues would you like to discuss during your 30-minute consultation?

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