

PERSONAL FINANCIAL SNAPSHOT PERSONAL INFORMATION

Your Name _____ Age _____ Type of Work _____ Spouse
Name _____ Age _____ Type of Work _____ Have you been
through FPU? Yes No What's FPU? Number of Children or Other Dependents _____ Mailing Address

City _____ State _____ ZIP _____
Phone _____ Email _____ Preferred method of
contact for your session? In Person Phone Video Conference

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

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?

HOUSING

Do you rent or own? Rent Own

▶ Are you current on your payment? Yes No ▶ What are
the total monthly payments?

CONSUMER DEBT

Do you have any vehicle loans? Yes No ▶ Are you current on
vehicle payments? Yes No ▶ What are your total
monthly payments?

List any total balances due:

▶ Credit Cards

▶ Student Loans

▶ Taxes

▶ Other _____

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

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