

Client Profile

Name	_____	Age	_____
Marital Status	_____	Spouse's Name	_____
Address	_____		
City	_____	Zip	_____
email	_____		
Home Phone	_____		
Work Phone	_____		
Mobile Phone	_____		
Nature of employment			
Self	_____		
Spouse	_____		
Names/Ages of Children			

Client Profile

What I Own-Owe-Make

What I Own			
Asset	Amount	Asset	Amount
Checking Accounts	_____	Auto age/make:	_____
Savings Accounts	_____	Auto age/make:	_____
Other Savings	_____	Other Possessions	_____
Insurance (cash value)	_____	Money owed to me	_____
Retirement Accounts	_____	Other	_____
Home (Market Value)	_____	Other	_____

What I Owe			
Debt	Balance	Min. Monthly Payment	Interest Rate
Mortgage	_____	_____	_____
Home Equity Loans	_____	_____	_____
Credit Card:	_____	_____	_____
Credit Card:	_____	_____	_____
Credit Card:	_____	_____	_____
Credit Card:	_____	_____	_____
Car Loan - 1	_____	_____	_____
Car Loan - 2	_____	_____	_____
Education Loans	_____	_____	_____
Family/Friends	_____	_____	_____
Other:	_____	_____	_____
Other:	_____	_____	_____

What I Make (Gross Income)		
Job Description	Gross Pay	Frequency(*)
Job #1:	_____	_____
Job #2:	_____	_____
Spouse Job #1	_____	_____
Spouse Job #2	_____	_____
Other Income	_____	_____
Total Monthly Income	=====	

*If paid weekly, multiply the gross income by 52 and divide by 12 for monthly income
 If paid every other week, multiply gross income by 26 and divide by 12
 If paychecks vary, use an average over the last 3 or more months

Client Profile

What I Spend

Gross Income		Insurance (paid by you)	
Salary # 1 (gross pay)		Auto	
Salary # 2 (gross pay)		Homeowners	
Other (gross)		Life	
Total Gross Income		Medical/Dental	
Giving		Other	
Church (Tithe)		Total Insurance	
Other Contributions		Household/Personal	
Total Giving		Groceries	
Saving		Clothes/Dry Cleaning	
Short-term		Gifts	
Retirement (401k, etc.)		Household Items	
Other Savings		Liquor/Tobacco	
Total Savings		Cosmetics	
Income Taxes		Barber/Beauty	
Federal		Contracted Services	
State & Local		Books/Magazines	
Other (eg, self-employment)		Allowances	
Total Income Taxes		Children's activities	
Debt Payments		Personal Technology	
Credit Card 1		Education	
Credit Card 2		Pets	
Credit Card 3		Other	
Credit Card 4		Total Household/Personal	
Education Loans		Entertainment	
Bank/Credit Union		Dining out	
Family/Friends		Movies	
Other		Sporting Events/Concerts	
Other		Cable/Streaming Services	
Total Debt Payments		Fitness/Sports Clubs	
Housing		Memberships & Subscriptions	
Mortgage/Taxes/Rent		Hobby	
Home Equity Loan Pmt		Travel (Vacations/Trips)	
Maint/Repairs/Landscaping		Other:	
Electric		Total Entertainment	
Gas		Professional Services	
Water		Child Care	
Trash		Medical/Dental/Presc.	
Telephone (land/cell)		Legal	
Internet		Counseling	
Other		College Payments (current)	
Total Housing		Other	
Auto/Transportation		Total Professional Services	
Car Payments		Miscellaneous	
License, Auto club			
Gas		TOTAL EXPENSES	
Bus/Train/Parking			
Oil/Lube/Maintenance		Total Monthly Income	
Total Transportation		Less Total Expenses	
		Income Over/(Under) Exp.	

Request

How can Budget Coaching Help You? _____

What steps are you taking to improve your situation? _____

Have you ever seen a financial planner/advisor? _____

If yes, who? _____

How were you helped? _____

Agreement

My/Our agreement with: _____

I (we) hereby make the commitment to actively participate with the Budget Coaching Ministry in seeking a resolution to the issues that brought me (us) to this place.

I (we) understand that my budget coach will attempt to assist me (us) in developing a plan, and that he or she does not make any representations or warranties with respect to the results of their services or their ability to help me (us) with my (our) credit/financial management.

I (we) understand that budget coaching is being offered to me (us) without charge or obligation, and that the coaches are volunteers who are donating their time to people requesting their assistance. Coaches have pledged to not benefit monetarily in any way as a result of their role as a coach and are thereby prohibited from selling any services or products to persons who seek their counsel.

I (we) further agree to indemnify and hold harmless all volunteers of the Budget Coaching Ministry, the sponsor church and its employees, agents, officers, and directors from any claim, suit, action, demand or liability of any kind and any nature arising out of, or in any manner connected with, my (our) participation in budget coaching.

Name _____

Date _____

Name _____

Date _____

*** If married, both spouses should sign**