



# Client Info Form

## Client Information

**1** Do you live with a person with whom you share financial responsibility (such as a spouse or long-term partner)?

Yes

No

**? 1.A**

**Legal Name (Client's Partner)**

**Client's Partner**

**Client Partner Name**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Birthdate (Enter in this format: MM/DD/YYYY): \_\_\_\_\_

Phone: \_\_\_\_\_ Phone Type:  Cell  
 Work  
 Home  
 Other

Birthdate (Enter in this format: MM/DD/YYYY) (Client): \_\_\_\_\_

Phone (Client): \_\_\_\_\_ Phone Type:  Cell  Home  
 Other  Work

**Home Address (Client)**

Address Line 1: \_\_\_\_\_

Address Line 2: \_\_\_\_\_

City: \_\_\_\_\_

- State:
- |                      |                |                |
|----------------------|----------------|----------------|
| Armed Forces America | Kansas         | Ohio           |
| Armed Forces         | Kentucky       | Oklahoma       |
| Armed Forces Pacific | Louisiana      | Oregon         |
| Alabama              | Maine          | Pennsylvania   |
| Alaska               | Maryland       | Puerto Rico    |
| Arizona              | Massachusetts  | Rhode Island   |
| Arkansas             | Michigan       | South Carolina |
| California           | Minnesota      | South Dakota   |
| Colorado             | Mississippi    | Tennessee      |
| Connecticut          | Missouri       | Texas          |
| District of Columbia | Montana        | Utah           |
| Delaware             | Nebraska       | Vermont        |
| Florida              | New Hampshire  | Virgin islands |
| Georgia              | New Jersey     | Virginia       |
| Guam                 | New Mexico     | Washington     |
| Hawaii               | New York       | West Virginia  |
| Idaho                | Nevada         | Wisconsin      |
| Illinois             | North Carolina | Wyoming        |
| Indiana              | North Dakota   |                |
| Iowa                 |                |                |

Zip code: \_\_\_\_\_

Do you take care of anyone financially (such as child, sibling, elder parent, etc.)?

Yes

No

? 1.B

**Dependent(s):**

Name (First Last): \_\_\_\_\_

Relationship (Child, Sibling, Parent, etc.): \_\_\_\_\_

Birthdate: \_\_\_\_\_



## FINANCIAL GOALS & OBJECTIVES

### How You Want to Live

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Which choice below describes best how you want to live financially? Please select one of the following: (*Where I want to be*)

GETTING BY – having some money saved, low debt and a steady income source.

COMFORTABLE – having a few years of money saved, no non-asset-backed debt and a steady source of income.

COMFORTABLE – having a few years of money saved, no non-asset-backed debt and a steady source of income.

FRUGALLY SECURE – on track to meet long-term retirement needs and being able to take care of loved ones.

SECURE – on track to meet long-term retirement needs and being able to take care of loved ones while having free time to experience life.

WEALTHY – having enough money to live the lifestyle I desire while securing my and my family's future.

### Your Priority Financial and Lifestyle Goals

What are your priority financial and lifestyle goals?

Short-Term Goals – Next 12 months

Mid-Term Goals – Next 2-10 years

Long-Term Goals – Next 10-20 years

### Your Challenges

What are some of the main challenges you are experiencing that you would like us to address?

Primary Challenges *(Any other problems or challenges I should be aware of? Examples: Late on payments, headed toward foreclosure, unable to cover bills, balloon loan payments due, etc. If so, please describe below:)*

Additional Challenges

## Your Financial Coaching Program Goals

What do you hope to achieve by joining this coaching program? Select as many as apply from the list below: (Program Goals)

Get a detailed personal financial report and plan.

Gain knowledge on personal financial topics.

Receive support, guidance & direction.

Receive accountability partner type support.

Establish systems & process to manage finances successfully.

Other - Describe Below:

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Other Goals Description *(If you selected "other" above, describe what you hope to achieve here.)*