

Financial Coaching Preparation Checklist

Name(s) _____
Date _____
Street Address _____
City, State, Zip _____
Telephone _____
E-mail Address _____

- What is your current situation?

- Clarify Goals - What do you want to accomplish with this meeting?

- Please utilize the **Initial Budget Form** to list your income/bills/debts/other expenses. It is VERY IMPORTANT that this be completed PRIOR to the meeting. Bring copies of your paycheck stub/bills/debts with you.

- Do you have Microsoft Excel on your computer? YES NO