

Client Profile

Name _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____

Email _____ Fax _____

Kids Names and Ages _____

Work (his) _____ Phone _____

Work (hers) _____ Phone _____

Preliminary

1. Why are you here and how can I help?

When did the problems start?

What do you think caused the problem?

2. What do you hope to achieve as a result of this process?

If your financial situation was perfect, what would be different?

What are your three primary financial goals?

3. How badly do you want to accomplish these goals? Are you willing to do whatever it takes? (If you don't we're wasting our time!)

4. 4D's of Change

- Desire
- Decision
- Discipline
- Delight

Specifics

1. How often do you get paid?

2. What happens to the paychecks?

3. How many checking accounts and savings accounts do you have?

4. Who pays the bills? When? How often?

5. Did you have to pay additional taxes or did you get money back as a result of last year's tax return?

6. How is your credit record?

7. Are there any bills that are past due? Anything close to repossession or foreclosure?

8. Are you current on your taxes?
