

Fill in what you can before your first coaching session. Rough numbers are fine, and you can skip anything you'd rather talk through in person. Please don't write account numbers or your Social Security number anywhere on this form.

About you

FULL NAME

NAME YOU GO BY

PHONE

EMAIL

MAILING ADDRESS

CITY

STATE

ZIP

BEST WAY TO REACH YOU

☐

Call

☐

Text

☐

Email

Best time:

Household and work

ANYONE JOINING YOU IN SESSIONS? (NAME)

DEPENDENTS (HOW MANY, AGES)

OCCUPATION / EMPLOYER

WORK STATUS

☐

Employed

☐

Self-employed

☐

Retired

☐

Other

What brings you in *Check any that fit*

☐

Build a budget that works

☐

Pay down debt

☐

Build savings or an emergency fund

☐

Improve my credit

☐

Plan a big purchase (home, car)

☐

Get ready for retirement

☐

Get on the same page with my partner

☐

Something else

IN YOUR OWN WORDS: WHAT WOULD YOU LIKE TO BE DIFFERENT A YEAR FROM NOW?

WHAT'S GOTTEN IN THE WAY BEFORE?

Your numbers

Monthly amounts. Estimates are fine.

Income *After taxes (take-home)*

YOUR PAY	PARTNER'S PAY	SIDE INCOME	OTHER
\$	\$	\$	\$

Spending *Your best guess for a typical month*

RENT OR MORTGAGE	UTILITIES	PHONE AND INTERNET	GROCERIES
\$	\$	\$	\$
EATING OUT	CAR PAYMENT	GAS AND UPKEEP	INSURANCE (ALL KINDS)
\$	\$	\$	\$
CHILDCARE	SUBSCRIPTIONS	GIVING	EVERYTHING ELSE
\$	\$	\$	\$

Debts *Credit cards, car, student, medical, personal, family*

TYPE (CARD, CAR, STUDENT...)	OWED TO	BALANCE	RATE %	MIN. PAYMENT
		\$		\$
		\$		\$
		\$		\$
		\$		\$
		\$		\$

Savings

CHECKING AND SAVINGS	SET ASIDE FOR EMERGENCIES	RETIREMENT ACCOUNTS
\$	\$	\$

CREDIT SCORE, IF YOU KNOW IT ☐ Don't know ☐ Under 580 ☐ 580-669 ☐ 670-739 ☐ 740+

Last thing

HOW DID YOU HEAR ABOUT RAMIREZ FINANCIAL?

SIGNATURE	DATE