

ACCOUNTABLE

GUIDED STEPS TO FINANCIAL FREEDOM

PRE - COACHING SURVEY

Congratulations on taking action! This survey will be used by your coach to prepare for your coaching session. All information in this survey will be kept in strictest confidence. If you aren't comfortable answering a question, simply leave it blank.

Date

Where did you hear about me?

Client Information

If answers are the same for the second person, leave the second field blank.

	Person 1	Person 2
Full Name	_____	_____
Age	_____	_____
Occupation	_____	_____
Phone #	_____	_____
Best Email	_____	_____
Gross Income	_____	_____
Hobbies & Activities	_____	_____
Location	_____	_____

Does anyone else live with you?

If yes, please complete

Name	Relationship	Name	Relationship
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Your Numbers

Exact numbers aren't necessary right now, we are just looking for a snapshot.

Last year's taxes...

Amount

Amount

Emergency Fund

Other Savings

Retirement Investments

Monthly Retirement Contribution

Education Savings

Other Investments

Other Significant Assets

Auto Insurance Premium

Life Insurance Premium

Total Debt (excluding mortgage)

Coaching Goals and Desired Outcomes

Select the coaching goals or outcomes that you would like to discuss.

Marriage preparation

Wealth building

Fine tuning finances

Accountability

Set up and effectively use a budget

Decide whether or not to purchase or sell a home

Improve communication with my spouse regarding money

Eliminate money fights

Improve credit

Learn how to handle collectors and collections calls

Paying off student loans

Get caught up on (mortgage, car payment, credit card(s), etc.)

list items to get caught up on:

Recent life change (engaged, married, kids, divorce, job loss, retirement, etc.)

describe event:

Crisis management and dealing with a crisis situation

describe possible or current crisis:

Feeling overwhelmed about money or debt

Decide whether or not to consolidate debt or file bankruptcy

Save for an emergency fund

Learn how to be a more knowledgeable investor

Learn how to help children, parents, relatives, friends, and others with money

Additional Information

What else do I need to know or would you like to add?