PERSONAL COACHING AGREEMENT

Thank you for making Financial Coaching part of your financial plan. We look forward to serving your needs and ask that you review the information below to help guide our relationship.

SCHEDULING APPOINTMENTS

To schedule an appointment, just call our office. We understand that your time and resources are extremely valuable so we ask that you honor your scheduled appointment time. If you need to reschedule, just let us know so we can reschedule.

SPOUSAL PARTICIPATION

If you are married, both spouses must participate and commit to all scheduled coaching sessions. If your spouse is not available for an appointment, we will reschedule.

COACHING SERVICES

We assume the responsibility of understanding and evaluating your current needs, goals and resources in order to develop a strategy to meet your objectives. However, in order to make your plan work, we expect that you will come prepared to take the steps necessary to succeed, take full responsibility for your plan and its implementation and contact us when you need additional advice and direction.

PAPERWORK

You are asked to complete preliminary paperwork (Financial Snapshot) to better prepare your coach. We ask that these forms be filled out to the very best of your knowledge and ability prior to your scheduled appointment. You assume all responsibility for providing accurate and complete materials, documentation and facts upon which our coaching may be based.

RESCHEDULING APPOINTMENTS

If you need to reschedule your session for any reason, please give us at least 24 hours' advance notice.

CONFIDENTIALITY POLICY

We will keep completely confidential all matters discussed, facts revealed, and the nature and content of all documents you provide to us or we generate. We will reveal such matters only upon receipt of a written authorization and clear, verifiable instructions from you telling us exactly what we may reveal.

DISCLAIMER

Coaching is designed to give you accurate and authoritative information with regard to the subject matter covered. We are not authorized to render legal, accounting or other professional advice. Since your situation is fact-dependent, you must additionally seek the services of an appropriate licensed legal, accounting or investment service.

PERSONAL FINANCIAL SNAPSHOT

APPOINTMENT DATE______________

PERSONAL INFORMATION

Your Name ______________________________ Age _______ Type of Work ____________________

Spouse Name ______________________________ Age _______ Type of Work ____________________

Have you been through FPU? O Yes O No O What's FPU? Number of Children or Other Dependents ____________

Mailing Address ______________________________ City ________________ State ________

ZIP __________ Phone ______________________________ Email ______________________________

INCOME

What is your monthly net take-home pay?________________

Do you have an irregular income? O Yes O No

Do you use a monthly budget? O Yes O No

SAVINGS

Do you have an emergency fund? O Yes O No

- How much is in the fund? ______________

Are you currently investing for retirement? O Yes O No

- What is your balance? ______________
- What is your monthly contribution? ______________

Do you contribute to non-retirement savings? O Yes O No

- What is your balance? ______________
- What is your monthly contribution? ______________

HOUSING

Do you rent or own? O Rent O Own

- Are you current on your payment? O Yes O No
- What are the total monthly payments? ______________
- What are your estimated monthly utilities (electric, natural gas, phone, etc) ______________

CONSUMER DEBT

Do you have any vehicle loans? O Yes O No

- Are you current on vehicle payments? O Yes O No
- What are your total monthly payments?____________

List any total balances due:

- Credit Cards ______________
- Student Loans ______________
- Taxes ______________
- Other ________________ ______________

WHAT PRIMARY ISSUE SHOULD WE FOCUS ON DURING YOUR COACHING SESSION?

O **Budgeting** O **Real Estate** O **Dealing With Collectors** O **Wealth Building/Investing** O **Debt Elimination**
O **Other**

LIST THE TOP THREE CONCERNS/QUESTIONS RELATED TO YOUR ABOVE SELECTION:

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SUBMIT