

FINANCIAL COACHING REQUEST

PERSONAL INFORMATION

Name: _____

Phone: _____

Email: _____

DOB: _____

Occupation: _____

Children/Dependents: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Southeast Campus: _____

Marital Status: Single Married Widow

Spouse Information: (if applicable)

Name: _____

DOB: _____

Occupation: _____

CURRENT SITUATION

My financial concerns: *(check all that apply)*

- Budgeting
- Real Estate Issues
- Debt Reduction
- Retirement Planning
- Negotiating with Creditors
- Other: _____
- I am experiencing a financial crisis.*

My level of financial stress: *(scale of 1-10)* _____

My willingness to adjust priorities & change behaviors: *(scale of 1-10)* _____

I have previously participated in a Financial Peace University class.

Unique or special circumstances I want to make you aware of: *(only complete if applicable)*



INCOME, ASSETS & DEBT

Total monthly household income: _____
(net take home pay; all sources)

Total value of all assets: _____

Total savings: _____
(readily accessible funds; not including retirement accounts)

Total retirement savings: _____
(IRA, 401(k), 403(b))

Home Ownership:

I rent my home. I own my home.

Remaining mortgage balance: _____

Monthly payment: *(mortgage/rent)* _____

Estimated home value: _____

Consumer Debt: *(vehicles, credit cards, non-mortgage loans)*

Total non-mortgage debt: _____

Total monthly payments: _____



COACHING REQUEST

My availability to meet with a coach: *(check all that apply)*

Weekdays Saturday Sunday Daytime Evenings

What I'm hoping to accomplish with the help of a Financial Coach:

I'm currently getting help from another mentor or advisor: _____

COMMITMENT:

I am committed to actively participate with the Financial Coaching Ministry to apply Biblical principles to my life and finances. To the best of my ability I will faithfully keep appointments with my coach.

Are you willing and able to make this commitment? YES NO

NEXT STEPS:

- Submit this Financial Coaching Request form by email to jballengee@secc.org or by mail to Southeast Christian Church, Generous Living Stewardship Ministry, 920 Blankenbaker Pkwy., Louisville, KY 40243.
- Your coach will contact you to setup a first appointment and to share initial action steps.