



Financial Counseling Preparation Checklist

Name(s)

Date

Street Address

City, State, Zip

Telephone

E-mail Address

- What is your current situation?

- Clarify Goals – What do you want to accomplish with this meeting?

- Please utilize the **Initial Budget Form** to list your income/bills/debts/other expenses. It is **VERY IMPORTANT** that this be completed **PRIOR** to the meeting. Bring copies of your paycheck stub/bills/debts with you.

- Do you have Microsoft Excel on your computer? YES
NO